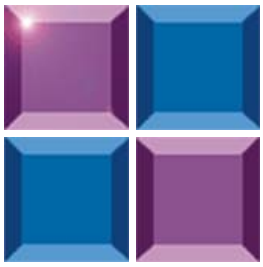
DATA PRO ACCOUNTING SOFTWARE, INC.

DP/DashBoard

Enterprise Management System
Part #440

User Manual



DATA PRO ACCOUNTING SOFTWARE, INC.

Advanced Accounting Software & Secure Internet Solutions

Version 7.2

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CHAPTER 1 INTRODUCTION

Data Pro Accounting Software's **DP/DashBoard** is a revolutionary new technology that extends its **Infinity COMMERCE** technology in many exciting new ways which allows firms of all sizes and shapes to manage their business from a completely new point of view. Depending on the company's specific needs, this product is targeted to address a wide range of *internal* needs for management and its staff alike.

As such, where Data Pro's e-commerce technology is easily used for doing business of the web with a company's customers, the **DP/DashBoard** system is primarily targeted for a company to use with its *internal* customers. In other words, this is primarily about doing business with a company's employees.

With this thought in mind, management has to be engaged from the beginning for any successful implementation of this product to occur. For those responsible with the task of deploying this product for the company, it is important to know from the beginning ***"what the target is"*** or the primary mission that you are trying to achieve before you start setting up the variety of features you will find throughout this product.

DP/DashBoard is not about a single solution. It is a **"collage"** of solutions facing a company in every day life. This includes very complex issues like **"Customer Complaints"** and how to deal with them to the very simple things in a company like the assimilation of a company's **"Phone List."** This may not sound very significant until you interview enough companies and find out how hard it is for the average company to keep an updated phone list going.

With employee turnover and new hires happening at most organizations on a regular basis, this can keep a good **"Executive Secretary"** busy in both large and small firms. However, delays in keeping this list up to date can cause confusion and frustrate new hires and existing staff alike. That's why a simple feature that allows firms to **"dynamically"** generate this list whenever an employee is added or deleted from the system is quite convenient.

The answer is **"yes."** Is it the only reason a firm would buy this product? Probably not! However, many firms with several locations and hundreds of employees may have a daunting task of keeping everyone up to date with who is currently on staff, where they are located and how to get a hold of them. The **DP/DashBoard** system immediately solves this kind of problem. One location or six hundred, it doesn't matter. That is the kind of **"internal"** solution the **DP/DashBoard system** is designed to address for a company.

From there, the company then decides what is important to management and what is important to its employees. There are specific features designed for both groups of users. That is why the variety of features are designed to work with the **"Advanced Security Administrator"** module that is included as standard feature with all versions of the **Infinity POWER** products starting with **Version 6.5** and above.

By being able to deploy each feature with a **"security"** decision, management can choose on a **"group by group"** or **"user by user"** basis which features it wants seen throughout the company. As such, the menus will be dynamically generated by the software to reflect only what is chosen by management for those groups or users accordingly.

This is an ideal solution since it may be possible that only the President, Vice President and Chief Financial Officer are allowed to see the Financial Statements *(such as the Balance Sheet and Income Statement).* Therefore, on a security level, all other users should be blocked from viewing the company's financial statements. With **DP/DashBoard** this is a standard feature. Based on the setup, only these three management users when they login would see a screen that may include all options (Figure 1-1):

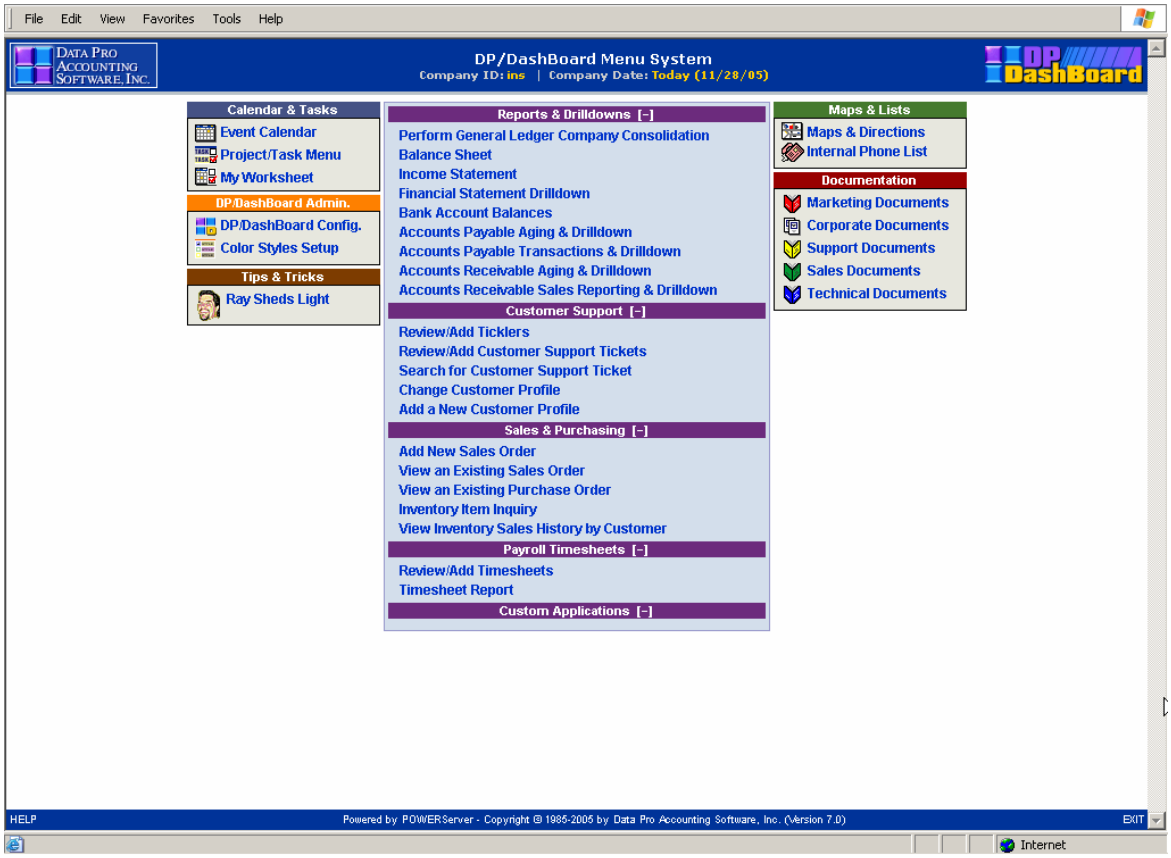

Figure 1-1. DP/DashBoard Menu System Screen – Full Option

Notice down the center of the screen how all of the financial statement options such as Balance Sheet, Income Statement, Financial Statement Drilldown and more are shown. Now, compare this with the following screen that you may see for a user in the Accounts Receivable Department who does not have the same access rights.

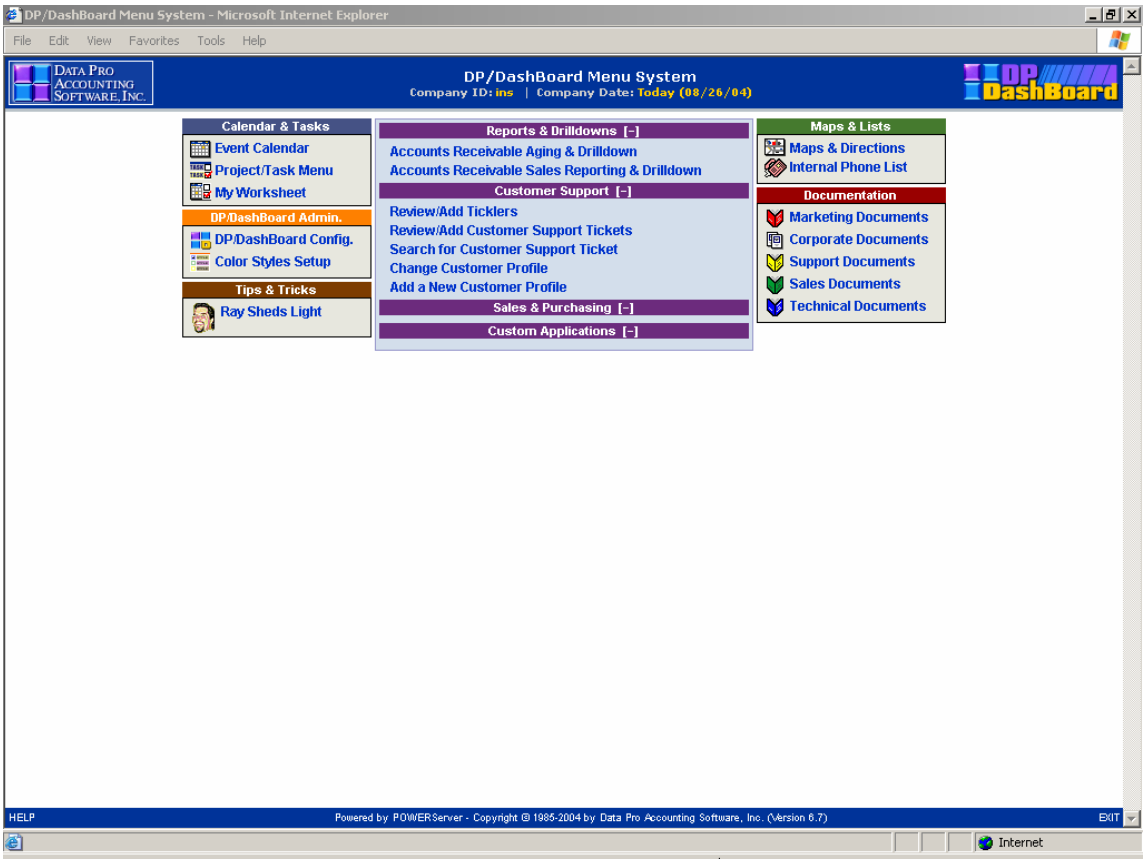

Figure 1-2. DP/DashBoard Menu System Screen – Accounts Receivable Options Only

The list of menu options is greatly reduced. This is why upper management/ownership has to be involved from the beginning with a deployment of this product. Who and what needs to be identified and decided upon from the beginning as to what each user is going to be allowed to see and do throughout the system.

So far, we have just touched upon a few of the features included in the **DP/DashBoard** product. There is far more. This includes a company wide calendaring system. You may say, *"I already use Microsoft Outlook or a product like Act! or Goldmine"* for your personal calendaring system. True. All are fine products for what they do. However, you must now look at a broader issue and that is the scheduling of people and corporate resources throughout the company *(not just yourself)* so that everyone may be engaged and work together.

DP/DashBoard provides such a capability. More importantly, it does it through a **"Browser-based"** technology so that it may easily be accessed from virtually anywhere in the world and not just on a single PC as would be the case on these previously stated products.

Therefore, if you intend to schedule a **"sales meeting"** next Thursday and need to invite thirty (30) people to the meeting, book a conference room and insure everyone is notified, the **DP/DashBoard** product is ideal for the task. It will automatically check for scheduling conflicts and send an e-mail to everyone notifying them of the scheduled meeting. Further, it will book the meeting on the central calendar and make it available for all to see who are eligible. This is not something an individual contact manager is very efficient at.

Likewise, for those companies in the service business *(air conditioning repair, network management, etc.)*, complete service departments can be setup and all of their scheduling by service technician can be managed through this tool. It transcends a wide variety of uses in all organizations. In fact, each user can keep their schedules on the system and in complete privacy as well! Therefore, when someone tries to invite them to a meeting or conference call for instance, it can notify them whether they are available or not automatically without having to say why. Full levels of security are available throughout.

DP/DashBoard also incorporates an advanced **"Project Management"** system that is useful for virtually any company. How many times have you found yourself trying to keep track of a project and wondering if the people you've assigned to the project were going to complete it, meet the deadline or had forgotten all about it? Wouldn't it be nice for Management to know that every department was keeping track of their assignments, regardless of their nature, and that Management had an ability to oversee these projects and more?

Does your company have a convenient way for all employees to see their **"Company Policy Manual?"** Is it up to date? Do you even have one? After much research, Data Pro found that the last question was one that many companies couldn't even answer **"yes"** to, much less the previous ones. **DP/DashBoard** solves many of these Human Resource Management problems by providing an elaborate **"Document Control"** system that allows a wide range of groups and sub-categories that may be established throughout the **DP/DashBoard** system for the purposes of managing word processing documents, spreadsheets, PowerPoint presentations, Adobe Acrobat files, JPGs, GIFs, WAV files, and much more.

The objective is to allow each organization to create a central location where staff may always know they can find the latest and greatest source of a specific document, regardless of which department they may be in. For instance, that could be the Policy Manual for the company as mentioned earlier. Or, it could be a document related to filling out an insurance claim for worker's comp.

However, the Sales Department may have a wide range of Product Literature it wants available for the entire company so they may be easily faxed or sent via e-mail from everyone's desktop. If you were a large automotive dealership with multiple lines of cars that you deal with, it would not be uncommon to set up several different sections specific to each brand *(i.e. Nissan, Mercedes, Jaguar, Ford, Toyota and more).* This way, the information would be instantly available to all of your staff by brand including all of the credit applications, financing documents, lien papers, mileage documents and more that may be required on each sales transaction.

Every business is different and that is why the **DP/DashBoard** product was designed the way it was. Flexibly! This includes options with almost everything, including all of the icons, having the ability to be changed by each company. And, don't forget to put a map with directions to each of your locations on your site so your staff, vendors and customers can easily find you! There's much more.

Finally, the **DP/DashBoard** is a beginning of your company's **"Intranet"** implementation, not an ending. The more you deploy the product you will probably find that you will want to do more. All Data Pro customers already have the technology that allows them to implement e-commerce over the web, if they desire.

DP/DashBoard is your beginning of your **"Internal"** implementation. The technology this product is based on allows you to continue to expand the number of options and features you want to add for years to come.

Therefore, you will only be limited by your imagination as to the options that may be deployed for your firm. If you need customized reports, specific web options, order processing, time sheet entry for Payroll and Job Cost purposes and more, this is all possible and with a high level of creativity to be had. Don't forget that like all **Infinity POWER** products, **DP/DashBoard** allows for multi-company processing. Therefore, it is not uncommon to implement this product several times on the same server to support multiple companies and multiple sets of financial statements.

Or, you may install the system once and consolidate all financial statements. The method in which you choose will be based on the goals you seek and will be discussed later in this manual so that you may make an informed decision as to what is right for your firm(s). The key is that you have the choice.

Welcome to a new way of managing a company with **DP/DashBoard**!

ABOUT THIS MANUAL

This manual includes three chapters and three appendices. The following table describes the organization of the manual.

Section in Manual	What You Will Find
Chapter 1	**Introduction** Introduces the conventions used in this manual and an overview of the DP/DashBoard product.
Chapter 2	**Installation** Explains the step-by-step installation procedures for the DP/DashBoard product.
Chapter 3	**Using DP/DashBoard** Explains how to configure DP/DashBoard and how to use its features.
Chapter 4	**DP/DashBoard Troubleshooting Guide** This troubleshooting guide is designed to help the user find solutions to common problems concerning the installation and configuration of this software and its related products.
Chapter 5	**Acronyms** Defines acronyms used in this manual.

Please refer to the ***Data Dictionary Reference Manual*** in your ***System Administrator User Manual*** for a description of the files, fields, and indexes used through the **Infinity POWER** Accounting System as well as the E-Commerce and **DP/DashBoard** products.

<Click> here to access the ***Data Dictionary Reference Manual in PDF format***.

<Click> here to access the on-line ***Data Dictionary Reference Manual***.

Please refer to the ***Security Objects Definitions Reference Manual*** in your ***System Administrator User Manual*** for a listing of security objects by module and their definitions.

<Click> here to access the **Security Objects Definitions Reference Manual** in PDF format.

<Click> here to access the on-line **Security Objects Definitions Reference Manual**.

CONVENTIONS USED IN THIS MANUAL

It is important to understand the conventions used in this manual. The following table describes text and formatting conventions.

Convention/Term	Type of Information
Component Name	Name of a specific item on the screen such as pull-down menus, buttons, text boxes, etc. Example: Enter the login name in the **User Name:** text box.
Filename or ***Directory Location***	Indicates a specific filename such as ***install.exe*** or a directory location such as ***C:\power***.
NOTE	Indicates information for notes, cautions, warnings or important information. Be sure to read these when they appear. **NOTE** This is an example of an important note.
>	Used to show the hierarchy of either menu options or cascading screens. Example: From your desktop, <click> the **Start** button and select the **Settings>Control Panel** menu option.
" "	In a procedure, quotations denote text that should be typed exactly as displayed within the quotations or an exact response to a command. Used for emphasis if used in a paragraph. Example: From the command prompt, type **"exit."**
< >	Denotes an action to be performed using the computer mouse (e.g. <Click> the **Save** button.)

DP/DASHBOARD REQUIREMENTS

DP/DashBoard must be installed on a Microsoft Windows 2000/2003 or XP Professional Server with Microsoft Internet Information Server (IIS) installed. All users accessing the **DP/DashBoard** system are required to have a current version of Internet Explorer or Netscape Navigator. If all users accessing the DP/DashBoard are located within the same network and behind the same firewall, the installation may be done on the same server as the current accounting server, providing there are enough resources on the server *(i.e. processor speed, memory and disk space)*.

If any users are to be accessing the **DP/DashBoard** from other locations *(i.e. Branch Offices, Home Offices, Portable Users)*, it is recommended that the **DP/DashBoard** be installed on a separate server from the accounting server. Further, all remote connections to the **DP/DashBoard** should be made through a **Virtual Private Network (VPN)** connection for security purposes. If supporting your accounting software, the **DP/Dashboard** system does require that your internal network system be configured for the **TCP/IP** networking protocol. See Chapter 2 Installation Procedures, for more detailed information regarding the installation and configuration of your networks, servers, and **DP/DashBoard**.

INFINITY POWER REQUIREMENTS

DP/DashBoard is highly integrated with a wide variety of **Infinity POWER** accounting modules. New and existing users should be aware that they must have installed all of the necessary **Infinity POWER** accounting modules for all **DP/DashBoard** features to be accessible. Otherwise, these features will simply not be available until these modules are purchased and/or installed.

Below is a complete listing of the current modules that are necessary for all **DP/DashBoard** features to be accessible:

Module	Part Number	DP/DashBoard Features
System Administrator (SA)	#100 – Standard Version #695 – Client/Server SQL Version	Includes the required POWERServer, Advanced Security Administrator module, Forms Generator, Menu Editing Tool, POWER Upgrade Utility, Data Dictionary, and Security Objects Definitions.
General Ledger (GL)	#101	Required for Balance/Sheet Income Statement/Consolidation and GL Drilldown features.
Accounts Payable (AP)	#102	Required for Accounts Payable Agings, Transaction Reports with Drilldowns.
Purchase Order Entry (PO)	#103	Required for Sales & Purchasing options such as View Existing Purchase Order. Must have AP module for all Purchase Order functions to be available.
Accounts Receivable (AR)	#104	Required for Accounts Receivable Drilldowns, Agings, and Transaction Reports. The AR module is also required to use the Customer Support Management module that is included with the DP/DashBoard Product. This is required for the Add/Change customer Setup Options and Support Tickler and Support Tickets.
Manufacturing Inventory Management (IM)	#105	Required for Inventory Item Inquiry, Sales Order, and Purchase Order options.
Sales Order Entry(SO)	#106	Required for Sales & Purchasing options such as Add New Sales Order and View Existing Sales Order. Must have AR module for all Sales Order functions to be available.

Module	Part Number	DP/DashBoard Features
Payroll (PR)	#108	Required for Payroll Timesheets options. Must also have TE module for all Payroll Timesheets functions to be available.
Check Reconciliation (CR)	#270	Required for Bank Statement Drill-down features.
Time Sheet Entry (TE)	#271	Required for Payroll Timesheets options. Must also have PR module for all Payroll Timesheets functions to be available.
Customer Support Management (SD)	#275	Required for Customer Support options.
DP/AUTO Event Triggering System	#450	If you have integrated the **DP/AUTO** product, the **"CalendarAlerts"** script will send an email notification of upcoming calendar events scheduled in **DP/DashBoard** and the "**CalendarWorksheet"** script will email a daily worksheet of calendar events and pending tasks.

Infinity POWER with the **POWERServer** module may be installed on any of the currently supported operating systems such as SCO UNIX, Red Hat Linux, Microsoft Windows 2000, Windows 2003 Server, XP Professional, and Novell Netware. The **Infinity POWER** accounting system can be installed with any of our supported databases that include support for FoxPro, dBase IV, Microsoft SQL Server 2000, and IBM DB2. All networks must support a TCP/IP based network protocol.

WARNING

You cannot have a virus protection program such as McAfee or Norton Antivirus running a **"hawk"** enables scan capability on the same server as the IIS Server.

CHAPTER 2 INSTALLATION PROCEDURES

This chapter describes the necessary installation procedures and configuration settings that are necessary for the **DP/DashBoard** system to operate properly. The subsequent sections contain procedures that **MUST** be performed in the order in which they appear.

NOTE

You must install or upgrade to Infinity POWER Version 7.2 BEFORE you install DP/DashBoard Version 7.2.

INSTALL MICROSOFT INFORMATION SERVER (IIS)

The **DP/DashBoard** system is designed to specifically take advantage of the Microsoft Information Server (IIS) which is typically available on systems such as **Windows XP Professional**, **Windows 2000 Server**, and **Windows 2003 Server**. You will find, however, that during most installation procedures the IIS portion of the Windows operating system is **NOT** installed by default. Unless it has been specifically installed by the System Administrator setting up your PC or Server during the installation of the operating system, then you will need to use the following easy guidelines to install and activate this requirement.

Using a Windows PC with **Windows XP Professional** installed, activating the **IIS** utilities is a simple process. This system can be the same PC or Server that is also acting as your accounting server as long as the **DP/DashBoard** system restricts access to only users from within your internal computer network. Ensure this PC or Server has enough memory, disk space and processor capabilities. If you intend to allow access from outside your corporate network, then it is highly recommended that a separate PC or Server be used for this configuration.

To Install Microsoft Information Server:

Before you begin, make sure you have your master Windows operating system installation disk(s) available for this procedure.

1. From your desktop, <click> the **Start** button and select the **Settings>Control Panel** menu option.
2. <Click> the **Add or Remove Programs** sub-menu option. The Add or Remove Programs window (Figure 2-1) displays, listing all currently loaded applications.

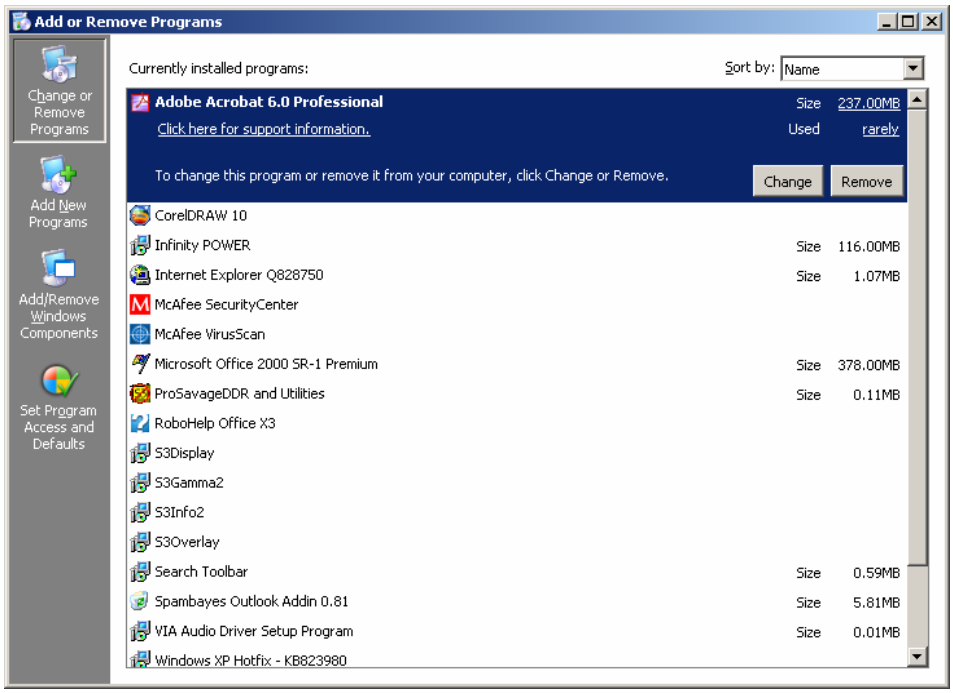

Figure 2-1. Add or Remove Programs Window

3. From the left side of the screen, <click> on the **Add/Remove Windows Components** icon. The Windows Component Wizard window displays (Figure 2-2).

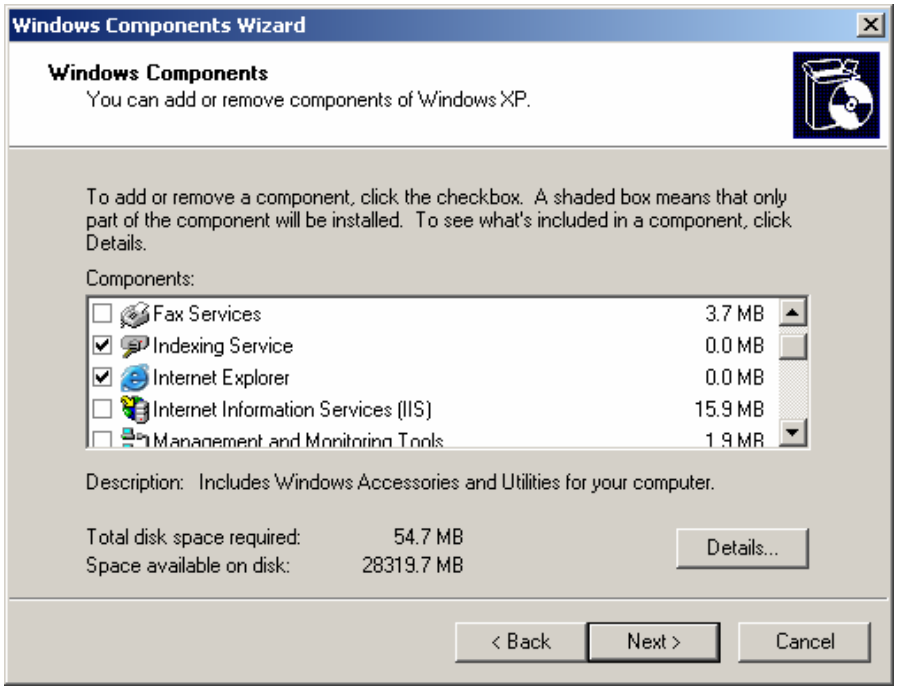

Figure 2-2. Windows Components Wizard

4. <Click> the **Internet Information Services (IIS)** check box for installation. A check displays in the check box.

NOTE

If this option is already checked, then some of these features have already been installed. It is recommended that you review the details of this installation to ensure everything is installed to your satisfaction.

5. <Click> the **Details** button to review all of the sub-components that will be installed as part of this installation. The Internet Information Services (IIS) details window displays (Figure 2-3).

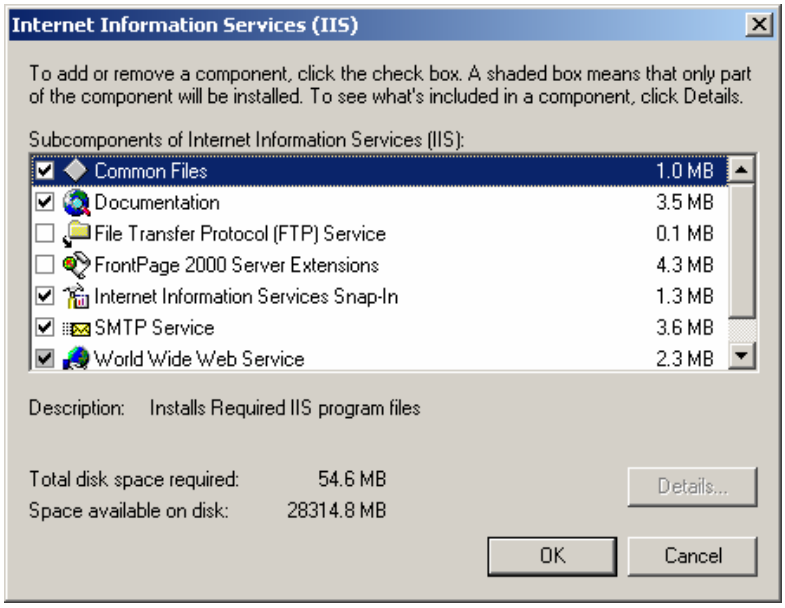

Figure 2-3. Internet Information Services (IIS) - Details Window

WARNING

It is not recommended by Data Pro that you add the File Transfer Protocol (**FTP**) Service subcomponent to your system unless you have other specific reasons outside of the scope of **DP/DashBoard**. The **DP/DashBoard** system does not utilize the FTP features and this feature could create a potential security breach if not implemented properly. Therefore, make sure you fully understand the ramifications of adding any of these additional components before you select them. The default listing you see above is acceptable for installation, although the **DP/DashBoard** system only requires the **"Common Files," "SMTP Service,"** and **"World Wide Web Service"** at a minimum to run the product.

6. <Click> the **OK** button to save the choices on this screen and return to the Windows Component Wizard (Figure 2-2) window.
7. <Click> the **Next** button to proceed with the installation. If your system requires original software, you may be asked to insert a Service Pack CD. The Insert Disk window displays (Figure 2-4) prompting you to insert the Windows XP Professional Service Pack 1 CD into your CD-ROM drive.

NOTE

Depending on your system and how many "Service Pack" updates have been made to the operating system, your prompts may be slightly different than what are shown here. Therefore, adjust your responses accordingly.

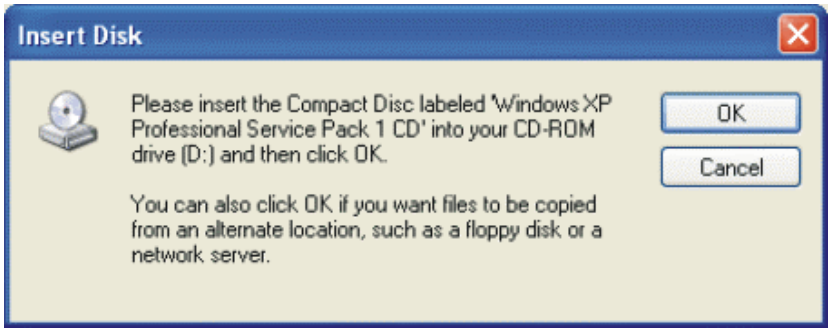

Figure 2-4. Insert Disk Window

8. Make sure the CD is in place and click the **OK** button to continue. The installation process will begin if the correct CD is in place (Figure 2-5).

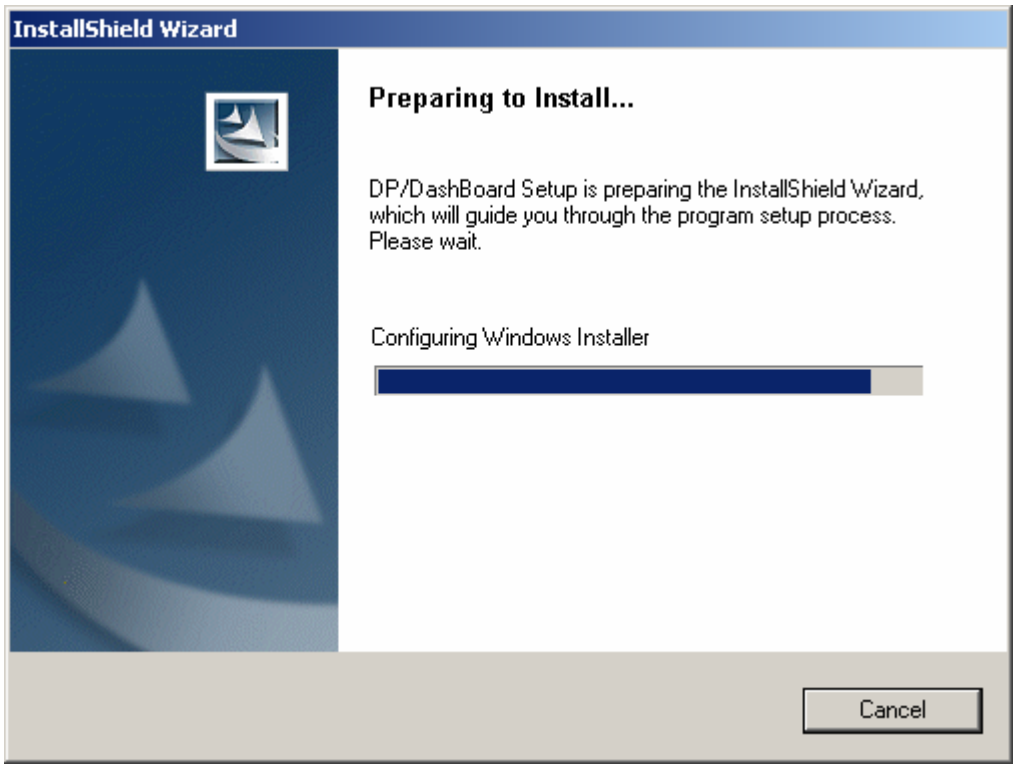

Figure 2-5. InstallShield Wizard

When the installation is complete the Completing the Windows Components Wizard window (Figure 2-6) displays.

Figure 2-6. Window Components Wizard Window

9. Click the **Finish** button to close the window and continue the installation process. All remaining windows close when the installation is complete.

IMPORTANT

There are two key issues with IP Addresses you must be aware of depending on how the **DP/DashBoard** system is going to be accessed and configured. First and foremost, inside your internal network and on your server that is running the Microsoft IIS software, you must have a fixed **"IP Address"** or the Microsoft IIS Server will not operate correctly. This means you must pre-assign a fixed IP Address to this specific server and cannot use the Dynamic Host Configuration Protocol **(DHCP)** feature that is common within many network configurations which allows for a dynamic assignment of IP Addresses.

For many companies using **DP/DashBoard**, this will be the only issue they need to worry about. However, if the business intends to allow any remote access for its owners and/or employees from outside the internal network, then you must assign a fixed IP Address to the server's web address so that all remote users know where to go each time they want to login. Otherwise, this could become a moving target if you allow your Internet Service Provider to dynamically and periodically assign you different IP Addresses.

All systems using **DP/DashBoard** must have a broadband connection to the Internet to support the minimum transfer of graphics and access. This means you will need an Internet access provider providing high speed access *(i.e. T-1, cable modem or DSL connection)* for the **DP/DashBoard** system to work correctly. Do not assume that your provider is automatically providing you a fixed IP Address connection! You need to specifically request one!!!

Again, this outside connection is only required if you want to make the **DP/DashBoard** system available to users who are accessing the system from outside the internal network. Remember, you may need to configure firewall access and should consider setting up Virtual Private Network **(VPN)** access to limit any other users from getting into your private network.

INSTALL OR UPGRADE INFINITY POWER AND RELATED PRODUCTS

If **Infinity POWER** is already installed on your system, including the **POWERServer** application and the **Customer Support Management** (**CSM**) module (**P/N #275**), and other licensed modules, skip to the next section, Configure the IIS Web Server. If you are running a lower version of **Infinity POWER** and you need to upgrade to Version 7.2, or you just need to install the **POWERServer** application and the **CSM** module, ensure that these options are selected on the Installation CD-ROM when prompted to select modules/applications for installation.

To Install or Upgrade Infinity POWER and Related Products:

1. Install **Infinity POWER** including the **POWERServer** application, **CSM** module, and other licensed modules (refer to the **Infinity POWER Installation Guide** for installation instructions).

   Either version of the **System Administrator** module (**P/N #100** or **P/N #695**) **MUST** be installed at a minimum to ensure that the **Advanced Security Administrator** module and the **POWERServer** modules are implemented. These modules are mandatory for the **DP/DashBoard** system to operate.

   The **DP/DashBoard** system will support the accounting software and the **POWERServer** module installed on an **SCO UNIX/Linux** system or the **Windows Graphical** or **Character-Based** system. The **DP/DashBoard** system does require that your internal network system be configured for the **TCP/IP** networking protocol.

   The **DP/DashBoard** system includes the **Infinity POWER Customer Support Management** (**CSM**) module (**P/N #275**) at no additional charge. This module **DOES** require the **Accounts Receivable** module (**P/N #104**) for full implementation. Therefore, if you intend to fully deploy the **CSM** features within the **DP/DashBoard** system that are supported by this product, you must have the **Accounts Receivable** module installed too. In future years, if you decide not to utilize these advanced product features, you may elect not to include this product as part of your Annual License Fee (**ALF**).

   As mentioned in the previous requirements section in Chapter 1, if you intend to utilize the various features such as the Financial Reporting capabilities (i.e. Balance Sheet, Income Statement), you must also have the **General Ledger** module (**P/N 101**) installed and configured. Or, if you want to be able to access the **Accounts Payable** transaction reports, agings and drilldowns, you must have the **Accounts Payable** module.

   All of these modules **MUST** exist in the **Infinity POWER** accounting system for them to appear and be accessible in the **DP/DashBoard** system. There is a direct correlation between the existence/setup of these products and the availability of these products within **DP/DashBoard**. Remember, the **DP/DashBoard** system has a broader management use and is not intended to replace the daily transaction processing flow of the normal accounting software. For example, the printing of checks in **Accounts Payable** is going to continue to be done from the **Accounts Payable** module (**P/N 102**), not the **DP/DashBoard** system.

2. Register installed software. During the installation process, be sure to register installed applications when prompted.

CREATE DATA FILES

Data files provide the capability to allow you to process information for each company you may have accessible from the **DP/DashBoard** system, keeping their features separate from one another. For instance, if you have only one company, the way you deploy this product is quite simple. There is only one set of accounting files and you only have to worry about installing and configuring one version or set of **DP/DashBoard** files. But, what if you own five or ten different companies? There are several questions that must be asked before we can proceed.

Because, as a business owner, your different companies may in fact be completely different in that they have no overlap of staff whatsoever, with no commonality of business type and you may in fact have different business partners engaged in each one.
As a result, you would need to treat each company completely different and would not want anyone from one company looking at anything in another company. One the other hand, you may be an owner of fifteen **(15)** auto

dealerships with a staff of 150 people and the only difference is the type of cars you are selling from location to location. All of your staff, in essence, still works for the same **"parent"** company and are subject to the same rules and you would want them on the same company phone list. This is completely different than our previous example.

Likewise, our third example could include a CPA firm who would like to host a **DP/DashBoard** for each of its clients. Each client would have its own General Ledger, unique Company Policy Manual, tax returns, calendars and much more. Therefore, the CPA firm would need to install a separate installation of the **DP/DashBoard** system for each client. The result would mean that each firm would not be mixing the variety of documents and financial statements into one system. All of these scenarios are possible with Data Pro's **Infinity POWER** applications and **DP/DashBoard**. What is necessary before you proceed with this installation is for you to decide which variation is closer to your firm's specific needs. The **Infinity POWER** applications support up to **47,000** different companies. Therefore, you should not face a realistic restriction in this regard.

To Create Data Files:

If you are going to process books for multiple companies, this step will be repeated for each company. This procedure is performed only once per company. Thereafter, your data files may be packed or re-indexed through each accounting module's option ***"Maintain Data Files."***

NOTE

The **COA** check box allows you the option to NOT include the default General Ledger Chart of Accounts. Uncheck the box to opt out of including the default General Ledger Chart of Accounts.

After the **Infinity POWER** products are installed, follow the subsequent steps using the **Infinity POWER** system.

1. From the Infinity POWER Main Menu screen, <click> the **System>System Administrator>Start Up from Scratch** menu option (Figure 2-7).

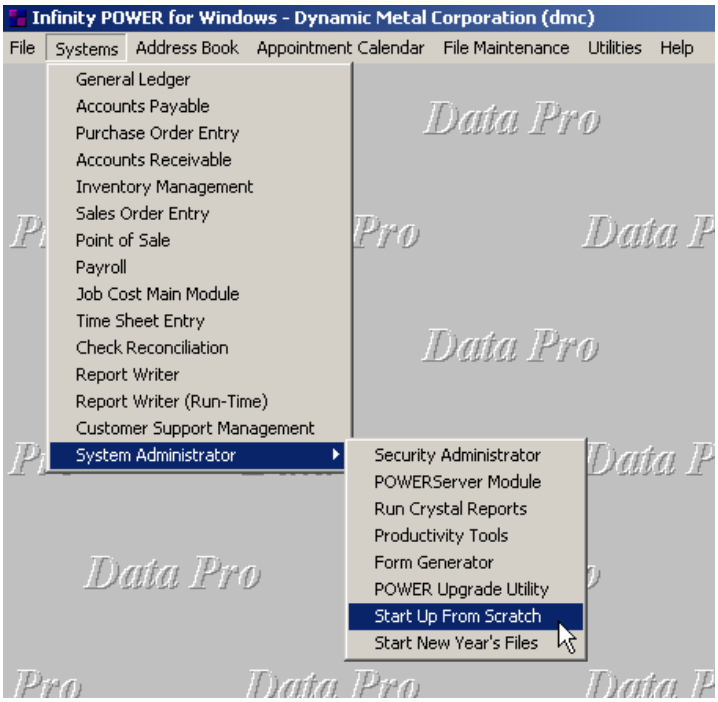

Figure 2-7. System>System Administrator>Start Up From Scratch

The Start Up From Scratch window displays (Figure 2-8).

NOTE

You must have the required modules for DP/Dashboard registered in order to access the full DP/Dashboard menu options.

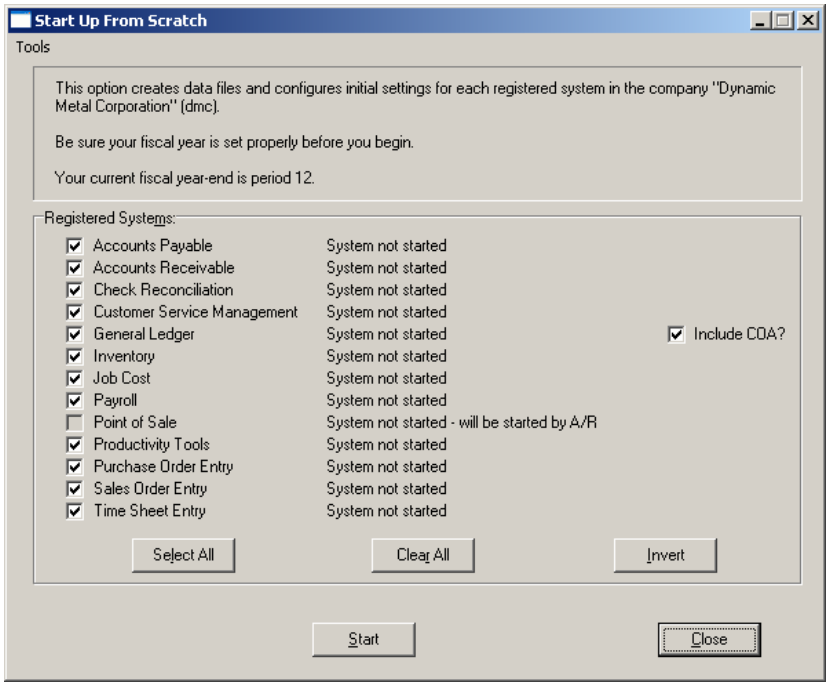

Figure 2-8. Start Up From Scratch Window

2. Select the desired modules or <click> the **Select All** button.
3. <Click> the **Start** button. The new data files are created. The window will reflect that the data files have been created for the specified modules.

NOTE

Repeat steps 1 through 4 for *each* company you wish to have accessible from the **DP/DashBoard** system.

4. <Click> the **Close** button when the process is complete.

CONFIGURE SECURITY SYSTEM OBJECTS

Security Objects are assigned to **DP/DashBoard** options to control who has access to them. These security objects are defined in the Advanced Security administration setup in the **Infinity POWER** program. By assigning specific Security Object rights to a **DP/DashBoard** option similar to those that have been assigned to an individual or a group of users in the accounting system, you can control who has access to this **DP/DashBoard** option and therefore have now also taken advantage twice of the Advanced Security administrator setup already in place.

NOTE

The DP/DashBoard security objects are defined in the Security Objects Definitions Reference Manual found in your System Administrator User Manual.

To Configure Security System Objects:

1. From the **Infinity POWER** – Productivity Tools menu options, <click> the **Systems** menu option and select the **System Administrator>Security Administrator** sub-menu option (Figure 2-9). The Main Menu options update to reflect the Security Administrator function.

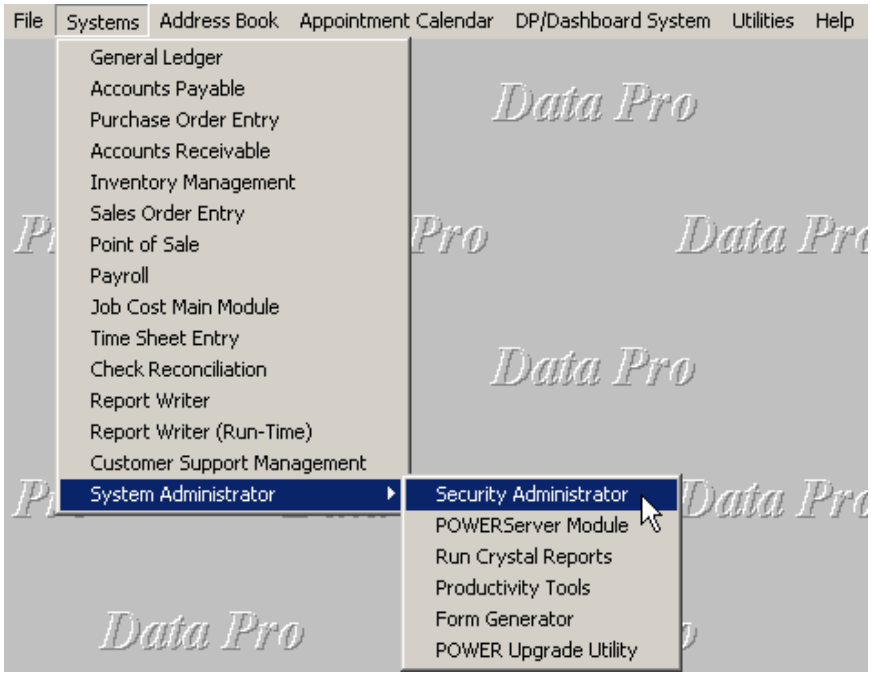

Figure 2-9. System>System Administrator>Security Administrator

IMPORTANT

When installing the Infinity POWER products, **Advanced** security **MUST** be selected rather than **Standard** security in order the fully deploy **DP/DashBoard**. If **Standard** security was selected, the products can be reinstalled by running the installation utility Winstall for the Windows GUI or Dinstall for the Windows Character-based products. For SCO UNIX/Linux users, the ***installpwr*** must be run to select the **Advanced** version of security.

2. From the Infinity POWER – Security Administrator Main Menu options, <click> the **Set Up & Maintenance** menu option and select the **Create Company Rights** sub-menu option for a new installation OR the **Update Company Rights** sub-menu option if you are upgrading an existing installation (Figure 2-10).

NOTE

This will make sure that your security system has been updated with all of the new security objects included with this new version. Make sure that you perform this function for each company that you have created on your system.

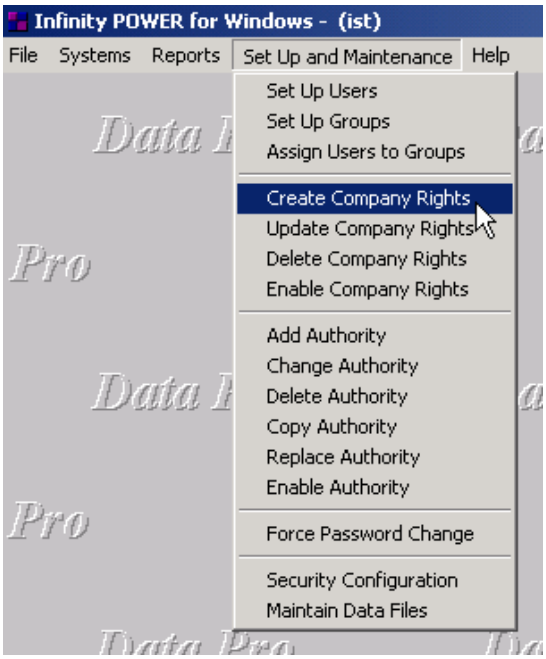

Figure 2-10. Security Administrator Menu>SetUp and Maintenance> Create Company Rights

The Create Company Rights dialog box (Figure 2-11) or the Update Company Rights dialog box displays.

Figure 2-11. Create Company Rights Dialog Box

3. <Click> the **Start** button.
4. After performing this function for each company, <click> the **Close** button.

To Setup Security System Groups and Users:

These options define the security access to the **DP/DashBoard** configuration option for each group or user. Refer to the Advanced Security Administrator manual for instructions on how to setup the security system.

NOTE

The DP/DashBoard security objects are defined in the Security Objects Definitions Reference Manual found in your System Administrator User Manual.

1. From the **Infinity POWER** – Security Administrator Main Menu options, <click> the **Set Up & Maintenance** menu option and select the **Set Up Users** or **Set Up Group** sub-menu option (Figure 2-12).

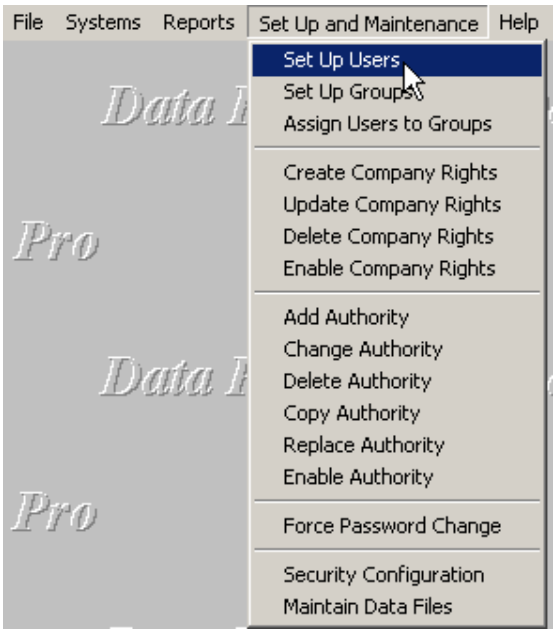

Figure 2-12. Security Administrator Menu> Set Up and Maintenance>Set Up Users

The Maintain Users (Figure 2-13) or Maintain Groups (Figure 2-14) dialog box displays.

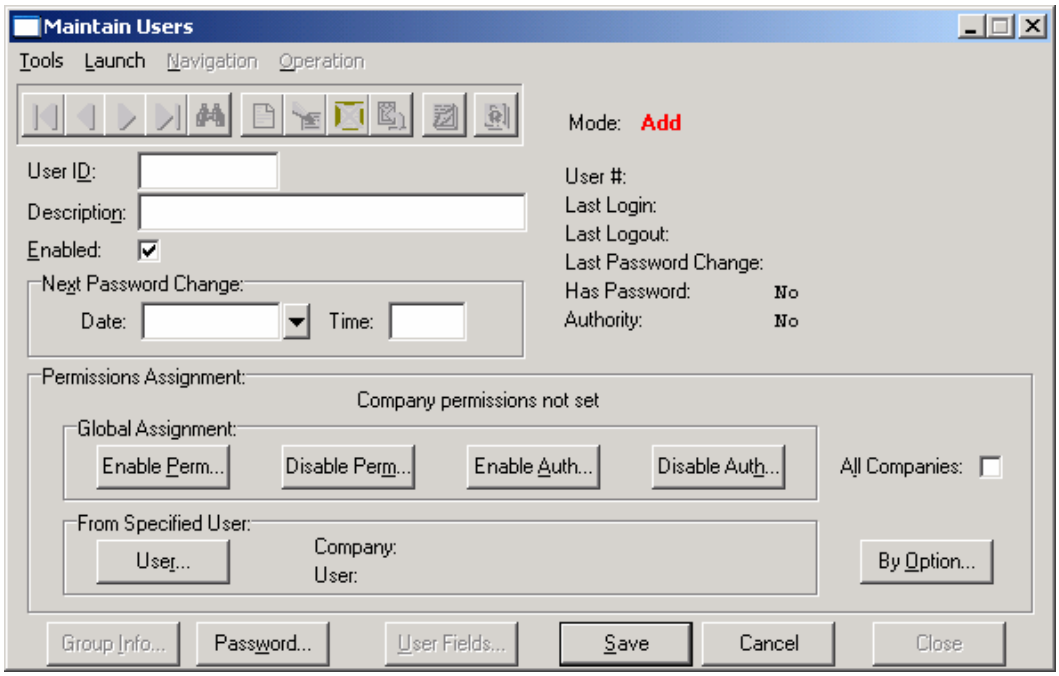

Figure 2-13. Maintain Users Screen

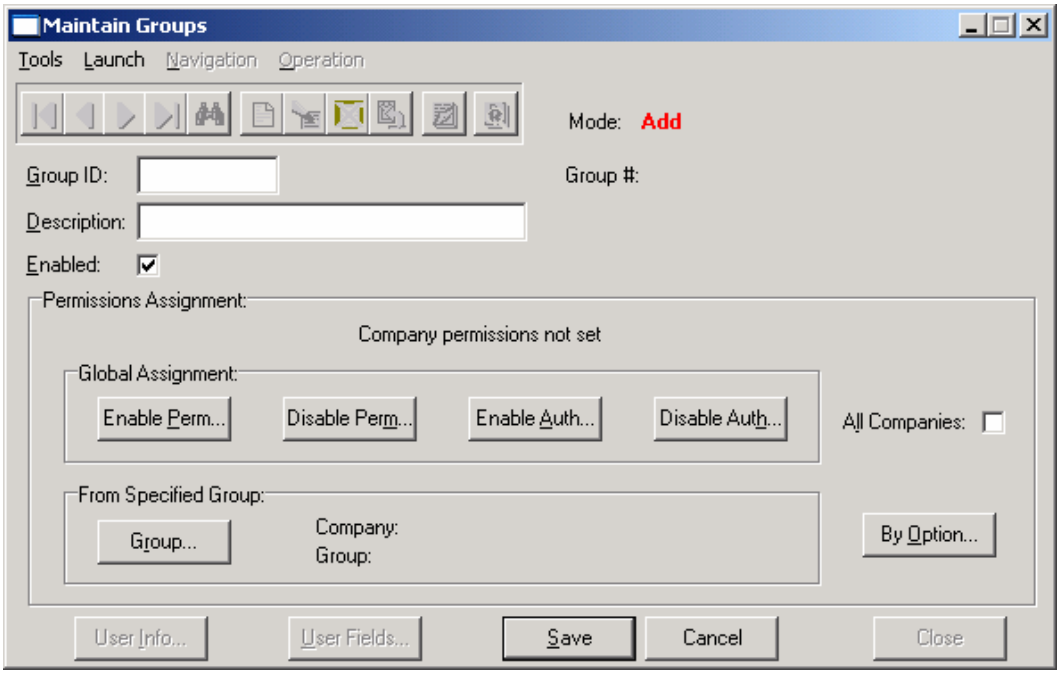

Figure 2-14. Maintain Groups Screen

2. If you are not already in Add Mode, <click> the **Operation** menu and select the **Add** menu option. This allows you to add a new Security System user for the **POWERServer** module to be able to login to the **Infinity POWER** accounting system.

3. Specify the **User ID** or **Group ID** and **Description** in the appropriate text boxes and then disable access to all options by <clicking> the **Disable Perm…** button. Data Pro recommends adding a user called **"web"** as the POWERServer user.

NOTE

The User ID or Group ID defined here **MUST** be defined exactly the same in the POWERServer Configuration screen, **Login User Name** option in the Configure POWERServer Option section .

4. <Click> the **Password** button. The Select Password screen displays.

NOTE

This user **DOES NOT** need to, nor should have security access to any of your accounting module options. The **POWERServer** uses the User ID to perform the initial login to the system and begin the communications process between the **DP/DashBoard** system and the accounting server. However, the **DP/DashBoard** system requires each additional user to have an actual User ID and Password to check for their appropriate security rights. These User IDs must be assigned rights to the specific accounting modules and application options that you wish to allow them to access.

5. To set up the **DP/DashBoard** system and Customer Support Management security options, select the **By Option** button. The Option Rights window displays (Figure 2-15).

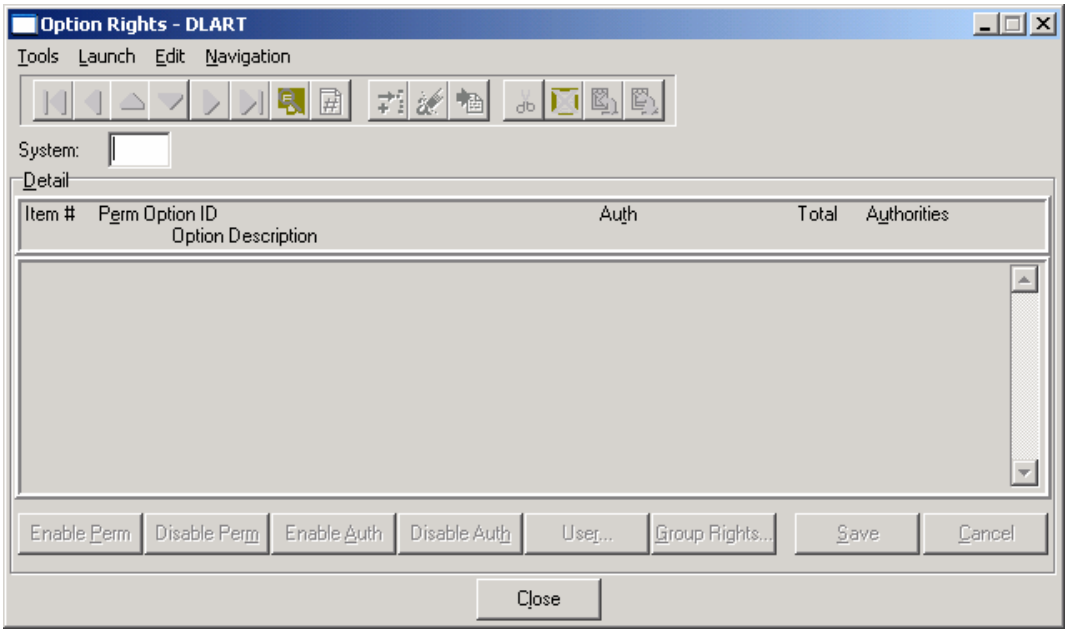

Figure 2-15. Option Rights Window

6. In the **System** text box, type "**db**" for **DP/DashBoard** and press the **Tab** key on your keyboard. The **DP/DashBoard** security options display.

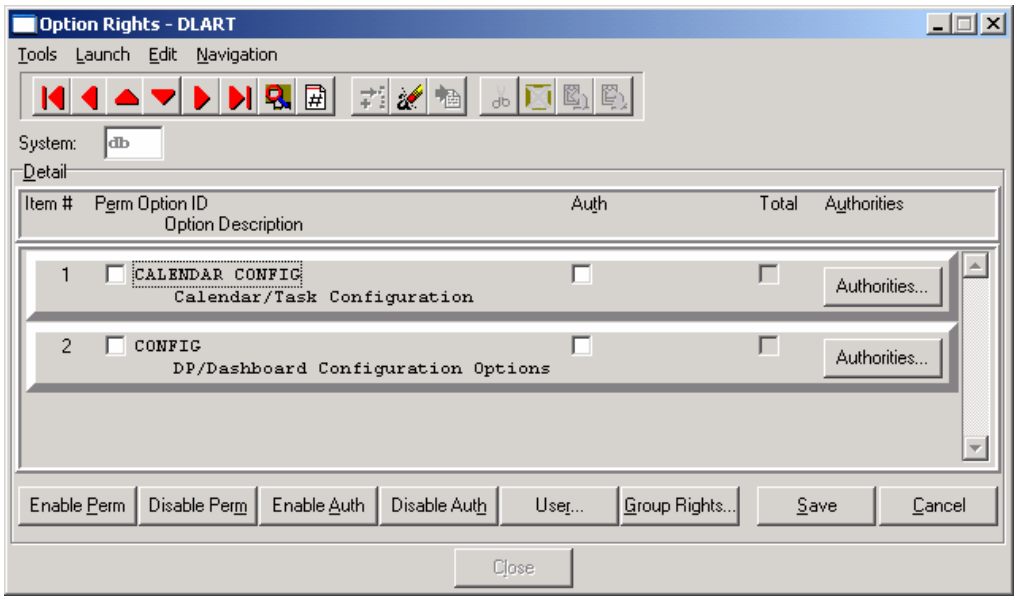

Figure 2-16. Option Rights >DP/DashBoard System

7. Check the security options you wish to grant the user rights to and <click> the **Save** button.
8. In the **System** text box, type "**sd**" for Customer Support Management and press the **Tab** key on your keyboard. The Customer Support Management security options display.

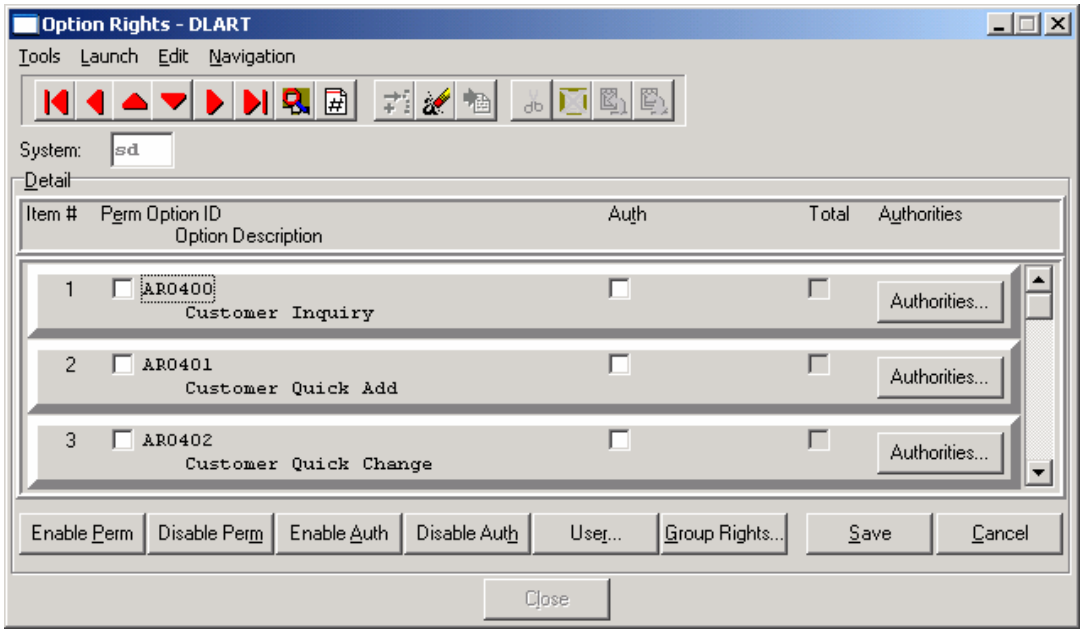

Figure 17. Options Rights>Support Management System

9. Check the security options you wish to grant the user rights to and <click> the **Save** button.

CONFIGURE POWERSERVER OPTIONS

After configuring the security system objects, the next step is to configure your **POWERServer** options.

To Configure POWERServer Options:

1. From the Infinity POWER – Security Administrator Main Menu options, <click> the **System** menu option and select the **System Administrator>POWERServer Module** sub-menu option (Figure 2-18). The Main Menu options update to reflect the **POWERServer** function.

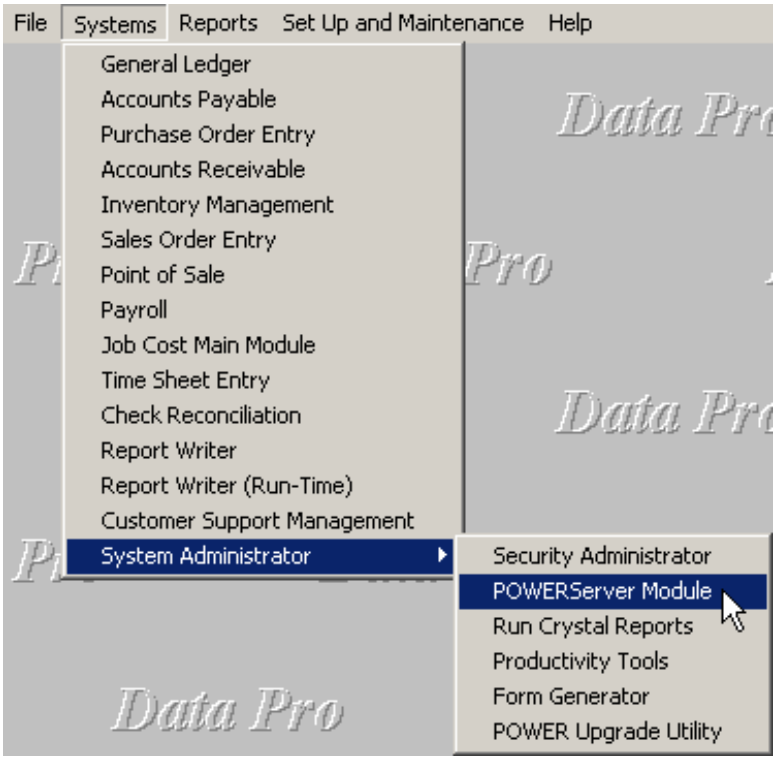

Figure 2-18. System>System Administrator>POWERServer Module

2. From the Infinity POWER – **POWERServer** Main Menu options, <click> the **POWERServer Options** menu option and select the **POWERServer Configuration** sub-menu option. The **POWERServer** Configuration window displays.

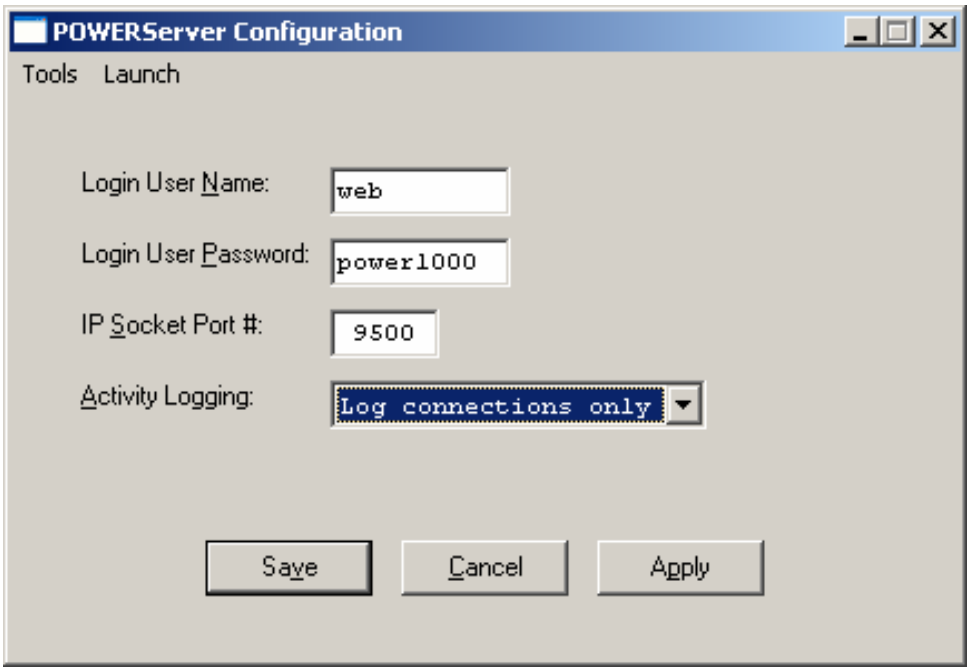

Figure 2-19. POWERServer Configuration Window

3. Specify the login name in the **Login User Name** text box and password in the **Login User Password** text box for the **POWERServer**'s initial login. This is the same User ID and Password that you defined in the Security System in the previous procedure.
4. Specify the channel/port number in the **IP Socket Port #** text box. This is the number *(or channel)* that the **POWERServer** will be listening for connections on.

NOTE

Port number MUST be between 1025 and 65000, however, there can only be one installed listening process on each port number. The default recommended number is 9500. The port number you specify here must also be specified exactly the same when installing the **DP/DashBoard** system or a connection cannot be made on the same channel.

SETUP POWERSERVER AS A WIN32 SERVICE ON THE SERVER

One of the servers or workstations on your network must now be chosen as the **POWERServer "server."** This is the server that runs the **POWERServer** process in the background, listening for connection requests from the **DP/DashBoard** and then accessing the accounting system. It is recommended that you choose the same network server that the accounting system is installed on. If you are using a **"Novell server"** as your accounting server, then you must choose a Windows XP, Windows 2000, or Windows 2003 workstation as the system to configure the **POWERServer** module.

To Setup POWERServer:

1. From the Accounting Server, <click> the **Start** button and select the **Run** menu option from your desktop. The Run window (Figure 2-20) displays.

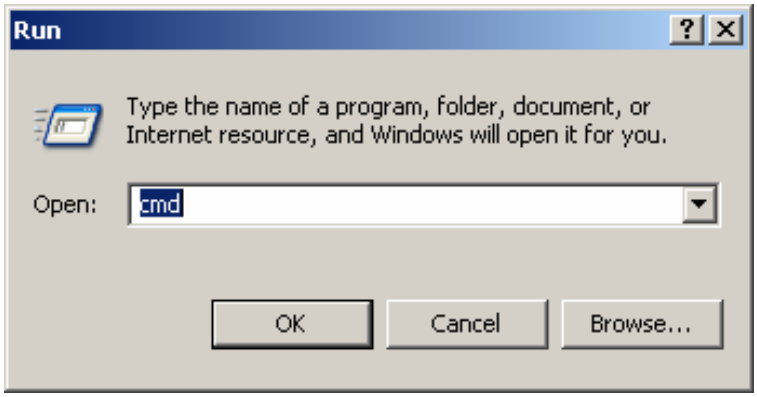

Figure 2-20. Run Window

2. Type "**cmd**" in the **Open** text box.
3. <Click> the **OK** button. The Command Prompt window displays.
4. Change the directory to where the accounting system is installed (i.e. *cd c:\power*). The prompt changes to the accounting software directory.
5. From the command prompt in the accounting software directory, type **"POWERService install"** and press **Enter** on the keyboard. This command installs the **POWERServer** module as a Windows Service which automatically starts whenever your server is turned on or rebooted.
6. Type "**exit**" and press **Enter** on the keyboard to close the command prompt window.

To Begin POWERServer for the First Time:

Once the **POWERServer** has been installed as a service, you must start the process for the first time.

1. From your Windows desktop, <right-click> on the **My Computer** icon

and select the **Manage** menu option. The Computer Management window displays (Figure 2-21).

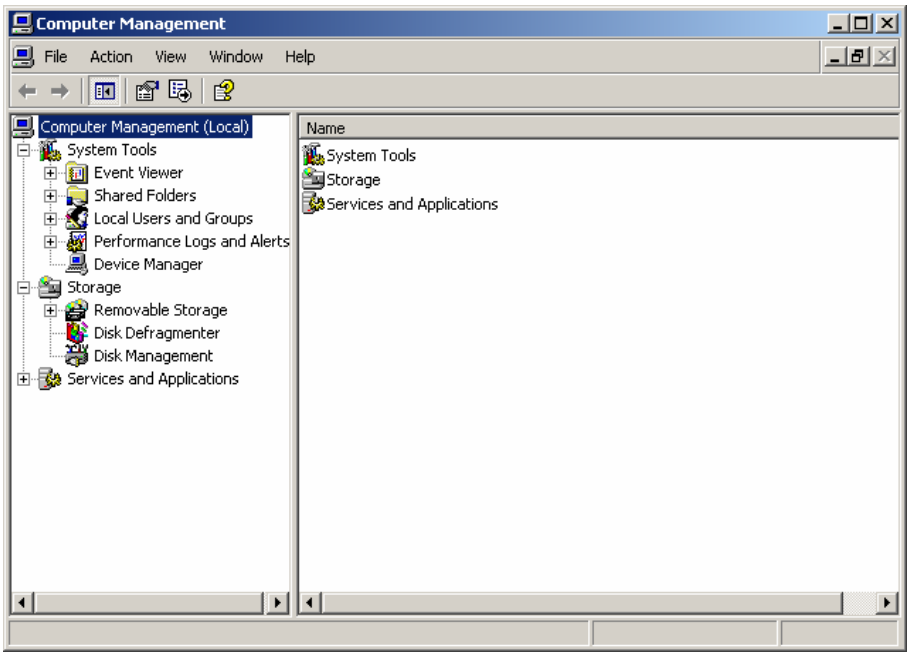

Figure 2-21. Computer Management Window

2. From the menu on the left, <click> the **Services and Applications** option and then select the **Services** sub-option. A list of services installed on your system displays in the right window. A list of services installed on your system displays in the right window.

NOTE

If the **POWERServer** application or your accounting data resides on a network server which require a specific path or security rights to be defined, you must change the Log On to be a valid network user and password. <Right-click> on the **POWERServer** service and select the **Properties** option. <Click> the **Log On** tab (Figure 2-22) and enter the network account user name and password.

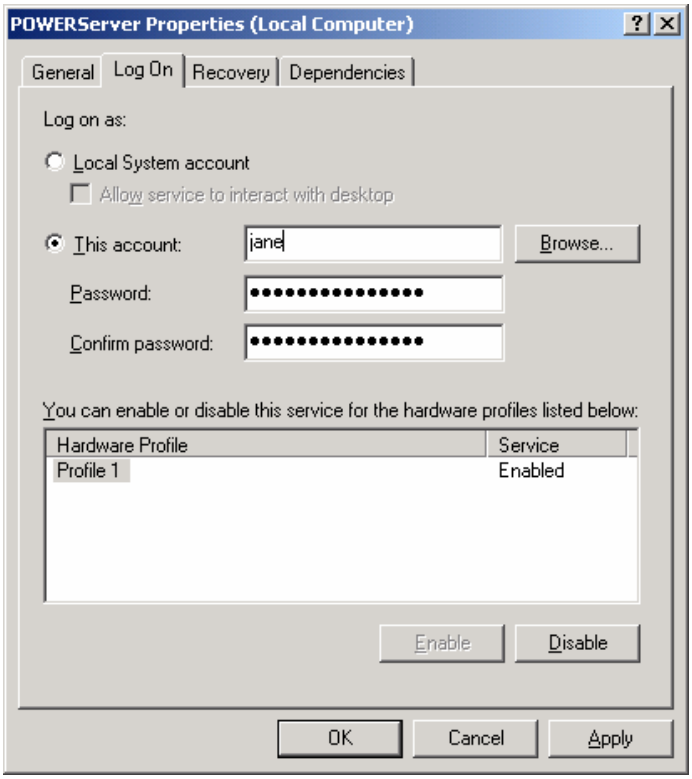

Figure 2-22. POWERServer Properties>Log On Tab

3. Scroll down to the **POWERServer** service, <right-click> and then select the **Start** menu option (Figure 2-23). The **POWERServer** utility starts and returns to the Computer Management window.

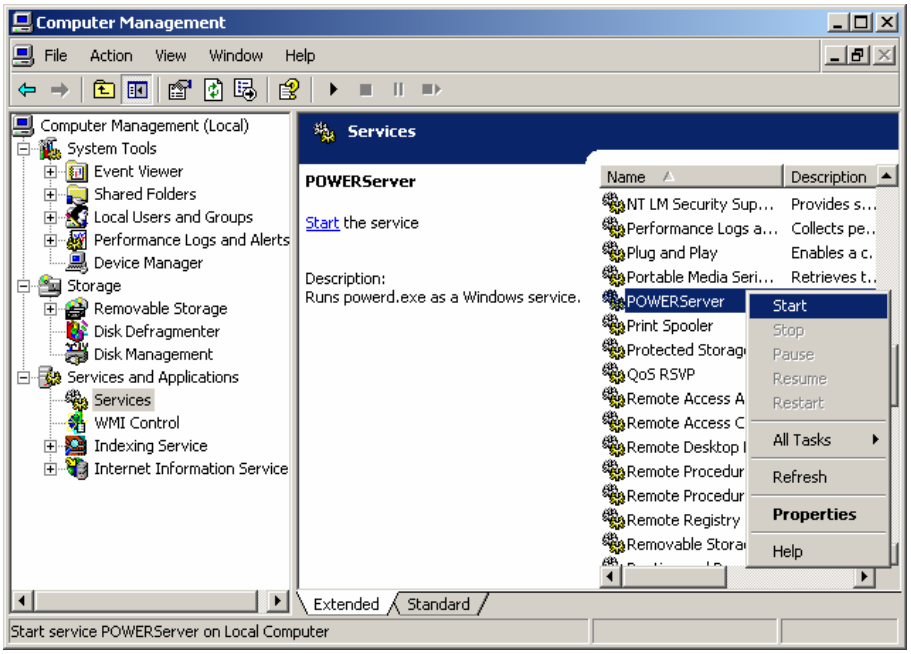

Figure 2-23. Computer Management Window - Launch POWERServer

INSTALL DP/DASHBOARD ON IIS SERVER

The **DP/DashBoard** system requires a Microsoft Internet Information Server (**IIS**) web server running on a Windows XP Professional, Windows 2000 Server, or Windows 2003 Server PC or network server. This IIS server must have IP network access to your accounting server, but does not require access to the Internet. You have a choice as to whether or not you want access to the **DP/DashBoard** from the Internet or only from within your internal network.

Before you Begin:

If you do not have the ***DPDashSetup.exe*** installation utility you need to download it from the Data Pro website. Once this file is downloaded, it is located in the ***dpdownload*** directory which should be found directly off of the root of Drive C.

1. If the ***dpdownload*** directory has never been created previously from a prior Data Pro software download, please do not save the file elsewhere, but create this directory on Drive **C:** of your IIS PC or Server. The Save As window (Figure 2-24) displays.
2. <Click> the down arrow in the **Save In** scroll list and then <click> the *dpdownload* directory.
3. Verify that ***DPDashSetup.exe*** is the file name in the **File name** display box.
4. Verify that Application is selected in the **Save as type** display box.
5. <Click> the **Save** button to save the file in the selected directory.

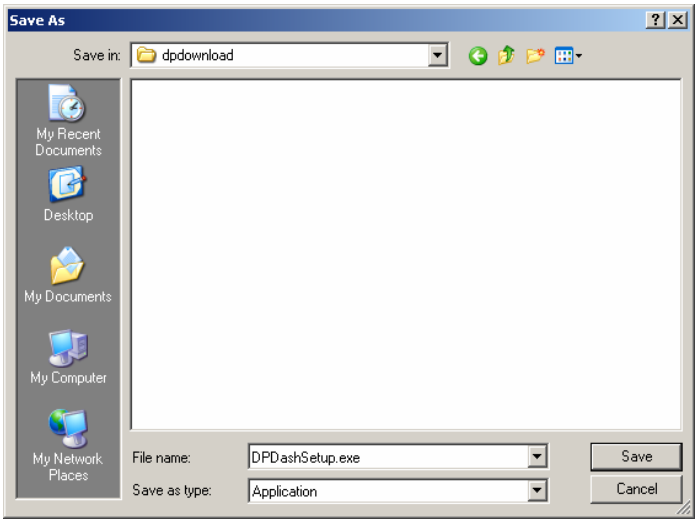

Figure 2-24. Save As Window

NOTE

Once this file is saved, you may use the Windows Explorer to go to the ***dpdownload*** directory and double click on the ***DPDashSetup.exe*** to begin the installation process. The following section will guide you through the installation process of the **DP/DashBoard**.

To Install DP/DashBoard on the IIS Server:

1. Using the Windows Explorer utility, go to the ***dpdownload*** directory (Figure 2-25) and locate the ***DPDashSetup.exe*** program.

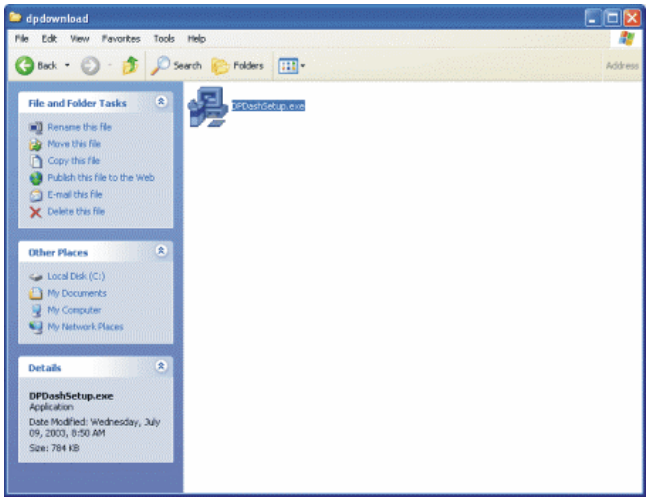

Figure 2-25. Windows Explorer – dpdownload folder>DPDashSetup.exe

OR

If you have been provided a **CD-ROM**, <click> the drive that the CD is loaded.

2. <Double-click> on the ***DPDashSetup.exe*** file to begin the installation. The InstallShield Wizard displays Figure 2-26).

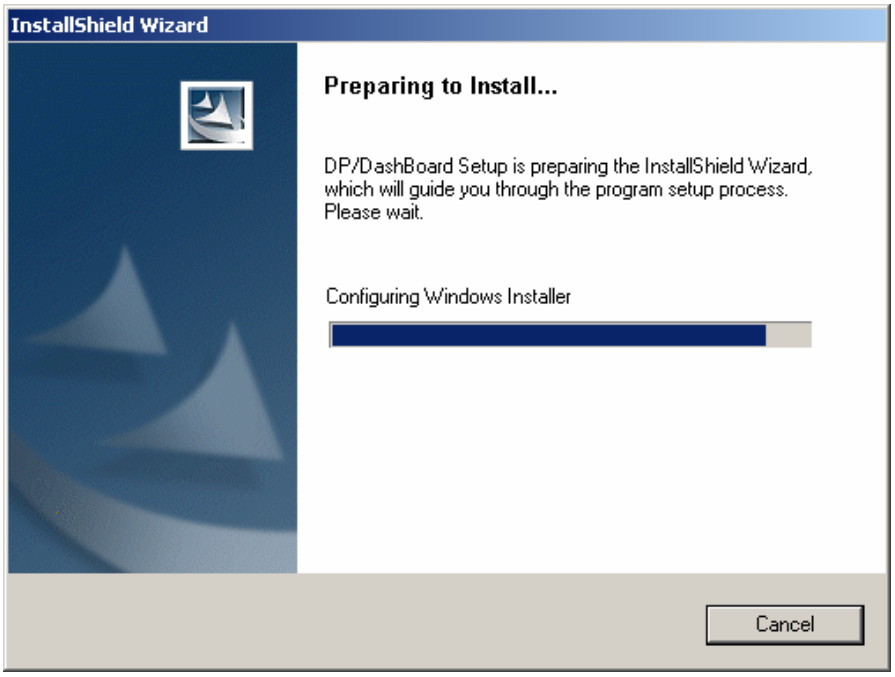

Figure 2-26 InstallShield Wizard

When the InstallShield completes configuration, the DP/DashBoard InstallShield Wizard – Welcome Window displays (Figure 2-27).

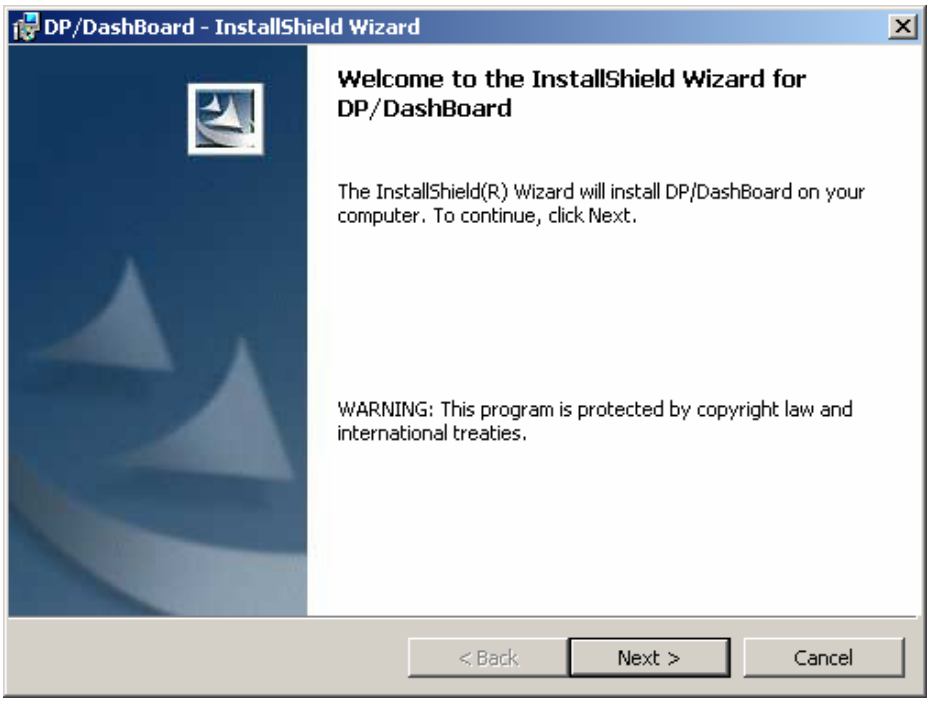

Figure 2-27 DP/DashBoard InstallShield Wizard – Welcome Window

3. From the DP/DashBoard – InstallShield Wizard Welcome window, <click> the **Next >** button to proceed to the next step of the installation. The License Agreement window (Figure 2-28) displays.

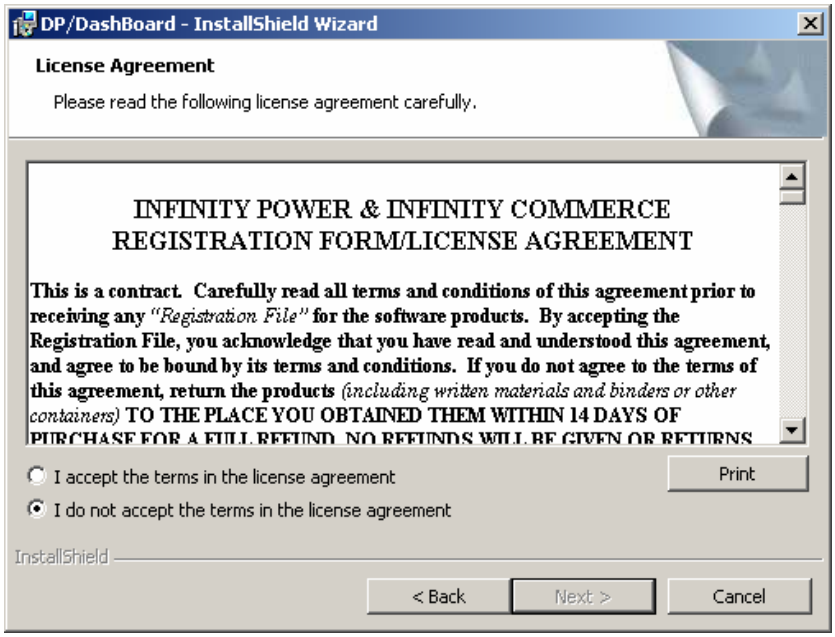

Figure 2-28 License Agreement Window

4. Make sure to read through the entire **Software License Agreement**. If you agree to accept the terms of the Software License Agreement, then click on the **I accept…** button and then click the **Next >** button to proceed with the next step of the installation.

   The Destination Folder window displays (Figure 2-29). This defines to the system where the program files will be loaded on your computer system

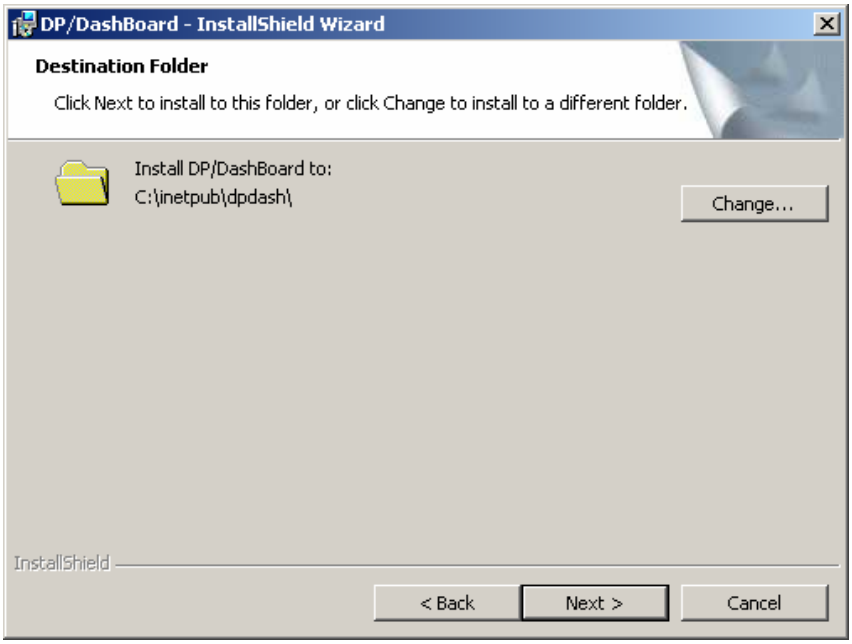

Figure 2-29 Destination Folder Window

5. <Click> the **Next >** button to install the default folder. The Ready to Install the Program window (Figure 2-30) displays.

NOTE

<Click> the **Change…** button to select a different folder other than the default.

The default directory path is ***c:\inetpub\dpdash***. The default web server directory in IIS is ***c:\inetpub\wwwroot***. This default IIS directory may already have web pages installed in it or you may already have your own web pages installed there. You may choose to install in the default IIS directory or choose the **DP/DashBoard** installation default as shown above. In either case, you must configure the IIS web server to **"know"** where the **DP/DashBoard** files are installed.

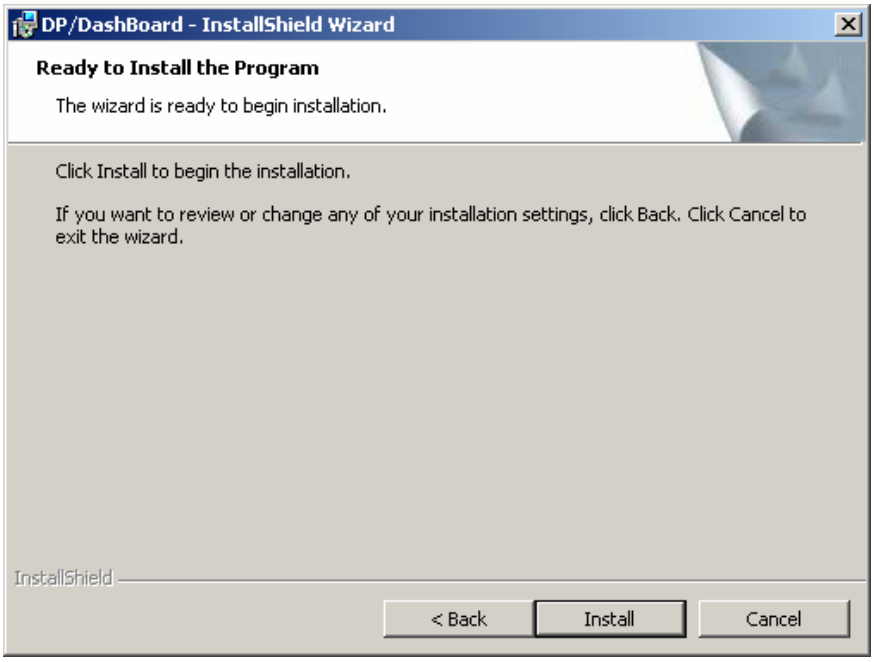

Figure 2-30 Ready to Install the Program Window

6. <Click> the **Install** button to begin installing **DP/DashBoard**. The Installing DP/DashBoard window displays (Figure 2-31).

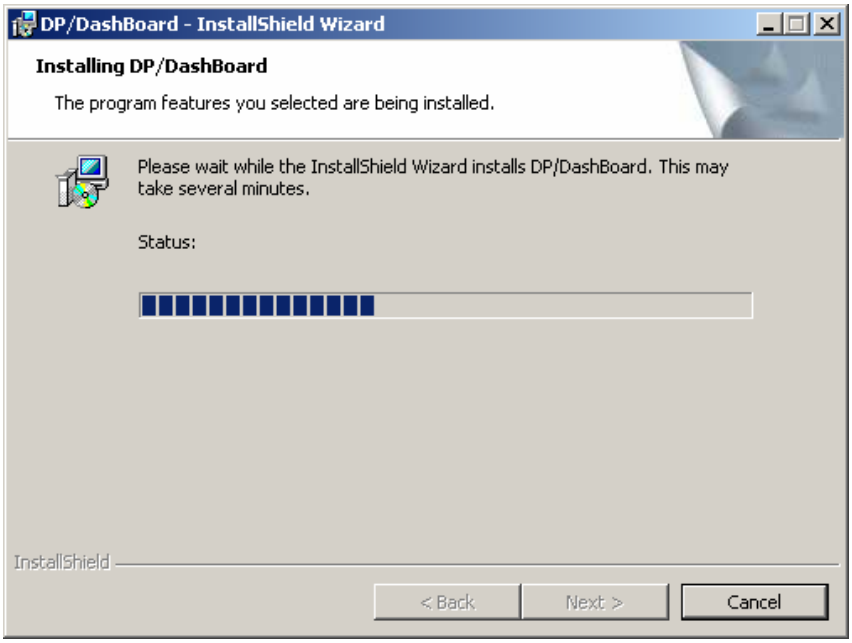

Figure 2-31 Installing DP/DashBoard Window

Once the **DP/DashBoard** installation utility has copied all of the files to your installation directory, the DP/DashBoard Configuration Utility window (Figure 2-32) displays. This allows you to specify the connection parameters to your accounting server and the accounting files.

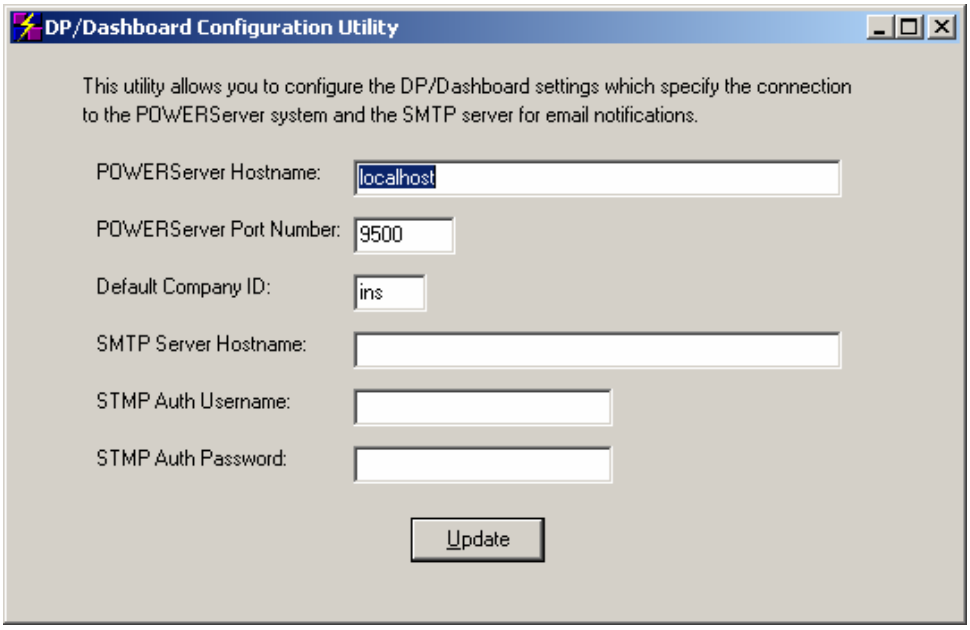

Figure 2-*32*. DP/DashBoard Utility Window

7. Enter the Hostname (or IP address) of the server on your network which is running the **POWERServer** process in the **POWERServer Hostname** text box.
8. Enter the IP port number that the **POWERServer** module has been configured to **"listen on"** in the **POWERServer Port Number** text box. This must be the same exact port that **POWERServer** is running on. The recommended port/channel is 9500. The valid range is 1034 to 65000.

> **NOTE**
> Entering a negative sign **"-"** before the **POWERServer Port Number** will encrypt all communication messages to the POWERServer. This security mode is necessary when you are using a third party Internet Service Provider which is hosting your web site and the communication back to your accounting system is over the internet.

The communication between the **DP/DashBoard** system and the **POWERServer** using the TCP/IP port number defined here is normally in clear text message mode. This is normally not a security issue if the **DP/DashBoard** and the **POWERServer** are all running on servers within your internal network. If you are hosting the **DP/DashBoard** product on an IIS web server which is outside your internal network then the TCP/IP communication messages will most likely be sent over the internet. In this case you should configure the TCP/IP communication system to use secured mode. Placing a negative sign (-) in front of the Port Number indicates to the system that all messages to and from the **POWERServer** should be encrypted. For example, instead of defining the Port Number to be **"9500"** set the port number to "-9500". The TCP/IP communication will still use port **9500** but all messages to and from the **POWERServer** will be encrypted. There are no P**OWERServer** configuration changes necessary to switch modes. The **POWERServer** will automatically switch between secured and non-secured modes based on the configuration of **DP/DashBoard**.

9. Enter the default company that **DP/DashBoard** will be connected to in the **Default Company ID** text box. This is the three **(3)** character company number which is the identifier for all of a company's accounting data files *(i.e. Company INS = Infinity Sample Company)*. The **DP/DashBoard** can be

configured later to access multiple companies, but this specifies the **"default"** company each user will be accessing the first time they log in to the system.

10. Enter the appropriate server name in the **SMTP Server Hostname** text box. Enter the domain name or IP address of your SMTP mail server. If this hostname is defined, the DP/DashBoard application will send a notification email to all of the calendar event attendees when an event is added or rescheduled. A summary email will also be sent to the customer and/or vendor if they are referenced on the event. This customer and/or vendor email will not contain the comments, attendees, and resources of the event.
11. Enter the desired SMTP authorization name in the **SMTP Auth Username** text box. If the SMTP mail server defined above requires username/password authentication enter the username here. This will automatically switch the email routines to the ESMTP protocol and pass the username/password login information to the SMTP mail server.
12. Enter the desired SMTP authorization password in the **SMTP Auth Password** text box. the SMTP mail server defined above requires username/password authentication enter the password here.
13. <Click> the **Update** button to finish the installation process. The InstallShield Wizard Complete window displays (Figure 2-33).

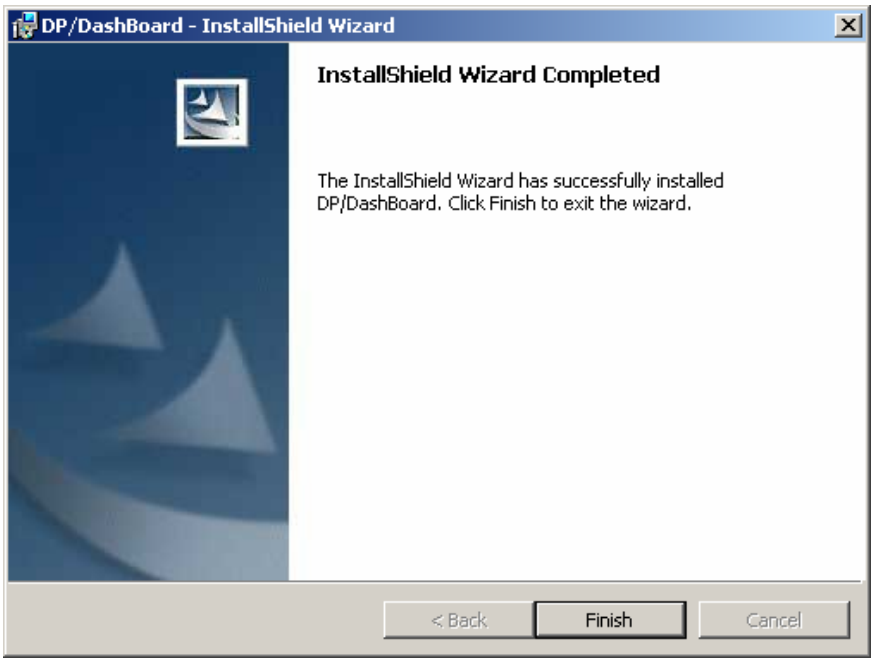

Figure 2-33. InstallShield Wizard Complete Window

14. <Click>the **Finish >** button to complete the installation of **DP/DashBoard**.

CONFIGURE THE IIS WEB SERVER

The Microsoft Information Server (**IIS**) must be configured to **"know"** where **DP/DashBoard** has been installed. This procedure documents both Windows XP and Windows 2003 screens. If you are running Windows 2000, these steps may differ slightly. After configuring the IIS web server, you must start the web server.

To Configure the IIS Web Server:

1. From your Windows desktop, <right-click> on the **My Computer** icon and select the **Manage** menu option. The Computer Management window displays (Figure 2-34).

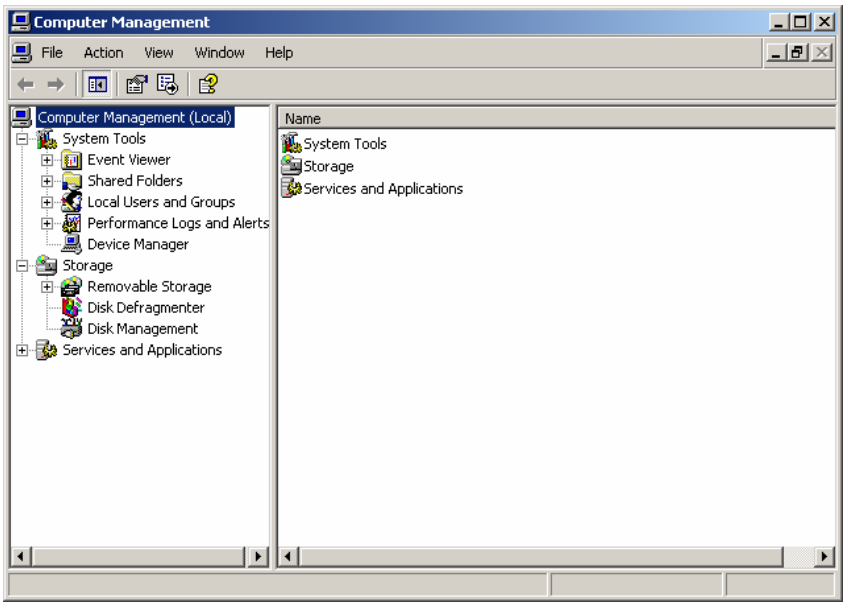

Figure 2-34. Computer Management Window – Configure Web Server Function

2. In the left screen menu, <click> the **Services and Applications** option and then select the **Internet Information Services** sub-option. A list of internet applications installed on your system displays in the right window (Figure 2-35)

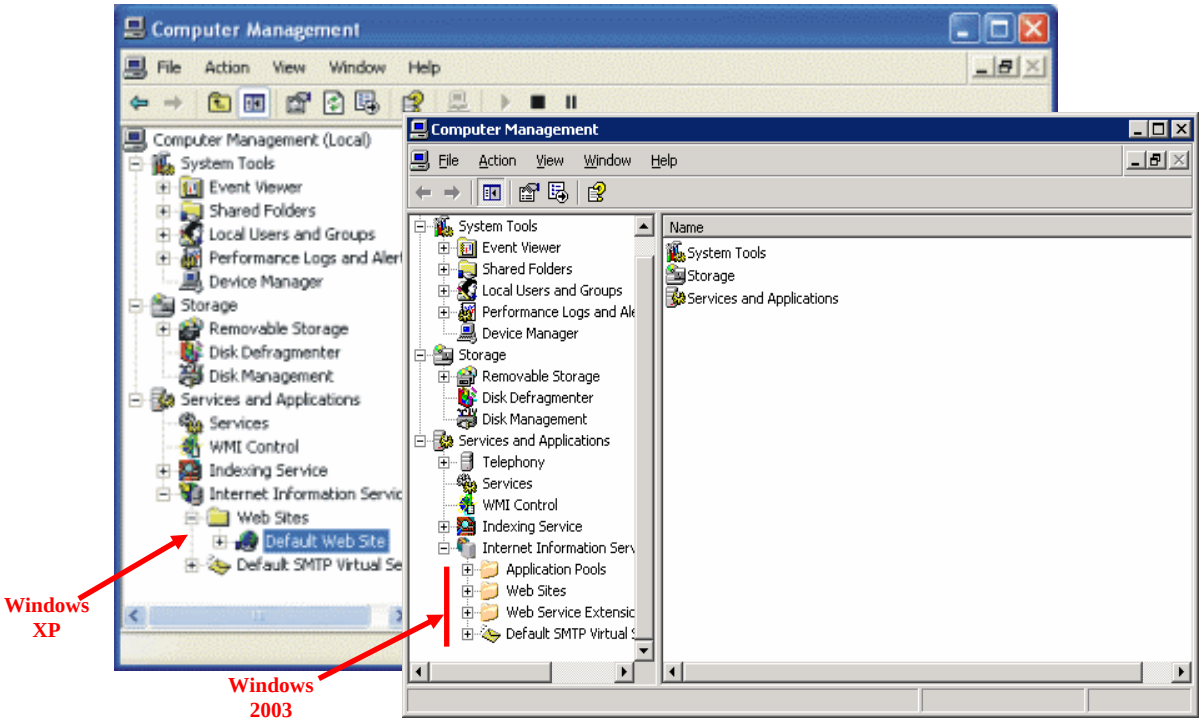

Figure 2-35. Internet Information Service>Web Sites Folder>Default Web Site

3a. If you are running Windows XP, scroll down and <double-click> the **Web Sites** folder, then <right-click> on **Default Web Site** and select the **Properties** option. The Default Web Sites Property window displays (Figure 2-36– left image).

3b. If you are running Windows 2003, scroll down and <double-click> the **Web Sites** folder, then <right-click> on **DP/DashBoard** and select the **Properties** option. The **DP/DashBoard** Properties window displays. (Figure 2-36– right image).

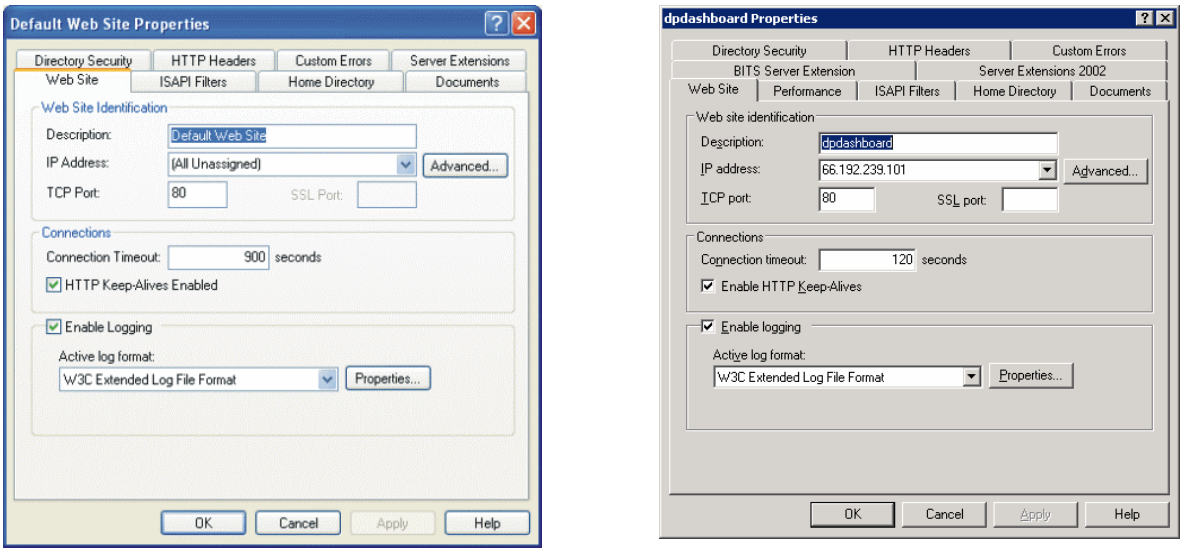

Figure 2-36. Default Web Site Properties Window

4. From the Properties window, specify all of the setup parameters of this web site. <Click> the **Home Directory** tab and <click> the **Browse** button to specify the directory the **DP/DashBoard** system was installed in. The default directory is ***c:\inetpub\dpdash*** (Figure 2-37).

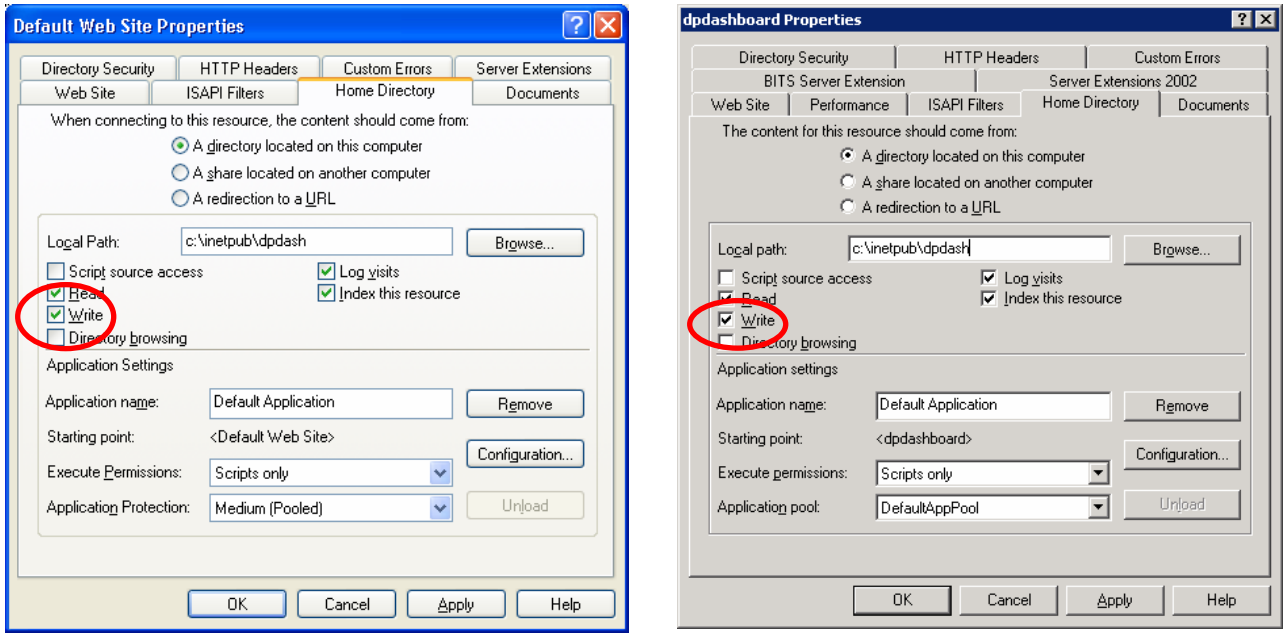

Figure 2-37. Default Web Site Properties>Home Directory Tab

5. Ensure the **Read** and **Write** check boxes are checked.
6. In the Home Directory screen select the **Configuration...** button. The Application Configuration window displays.
7. <Click> the **Options** tab if you want to change the **Session timeout** to a longer period than the default (Figure 2-38). This value specifies the number of minutes that the web server will keep users **"logged in"** to the web site when they are inactive. The recommended timeout value is **120** minutes.

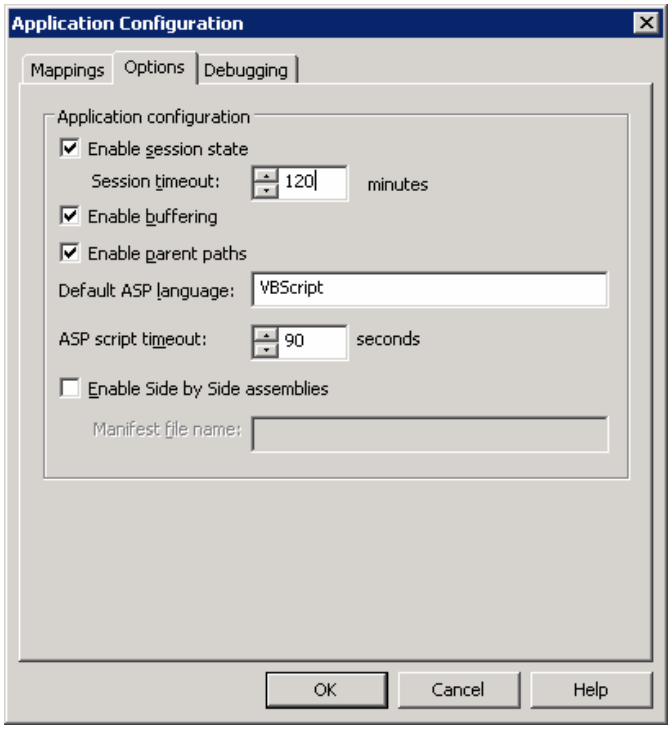

Figure 2-38. Home Directory>Application Configuration Window>Session Timeout Function

8. Ensure the **Enable parent paths** check box **IS** checked. In Windows XP, this is checked by default. In Windows 2003, this is **NOT** checked by default.
9. If desired, change the **ASP script timeout** to a longer period than the default. This value specifies the number of seconds the web server will allow a page to process data before it times out (e.g. file timeout or report processing timeout). The recommended timeout value is 90 seconds.
10. <Click> the **OK** button to save the configuration changes to the IIS web server. The Application Configuration window closes and returns to the Properties window.
11. <Click> the **Web Site** tab and ensure that the **TCP Port** is set to **"80"**.
12. <Click> the **Documents** tab and ensure that the **Enable default document** check box is checked. If ***Default.asp*** is not one of the options listed in the display window, <click> the **Add** button and type "***Default.asp***" to add this to the list. <Click> the **OK** button and confirm ***Default.asp*** is listed in the display window (Figure 2-39).

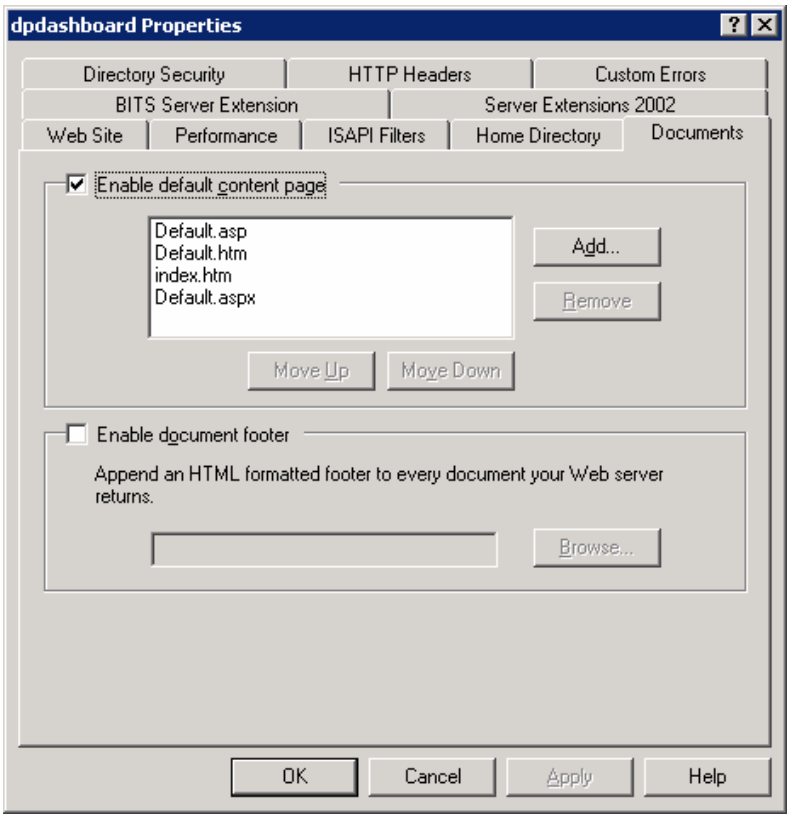

Figure 2-39. Properties>Documents

To Allow Active Server Pages (Windows 2003 Only):

If you are running Windows 2003, the Active Server Pages option **MUST** be set to **Allow** the web server to process active server pages.

1. From the Computer Management screen (Figure 2-34), under Services and **Applications>Internet Information Services**, <click > on **Web Services Extension**. The contents of the folder display in the right window.
2. <Click> the **Active Server Pages** option. A pop-up menu displays.
3. <Click> The **Allow** option. The status of the Active Server Pages now displays **Allowed** (Figure 2-40).

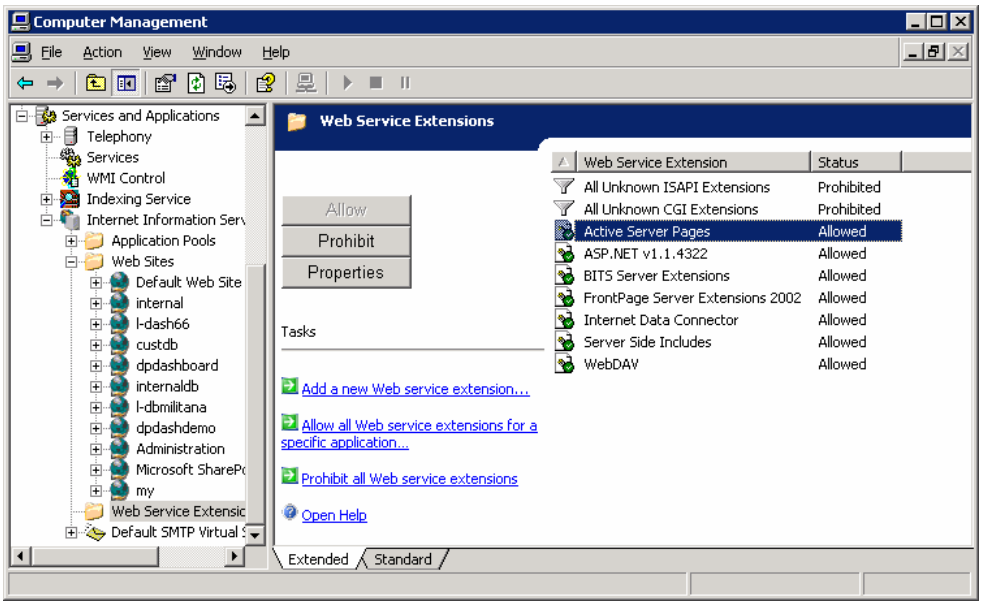

Figure 2-40. Active Server Pages>Allow Option

To Start the IIS Web Server Process:

The IIS web server process must be initiated.

1. From the Computer Management screen (Figure 2-34), <right-click> on **Default Web Site** and select the **Start** menu option.

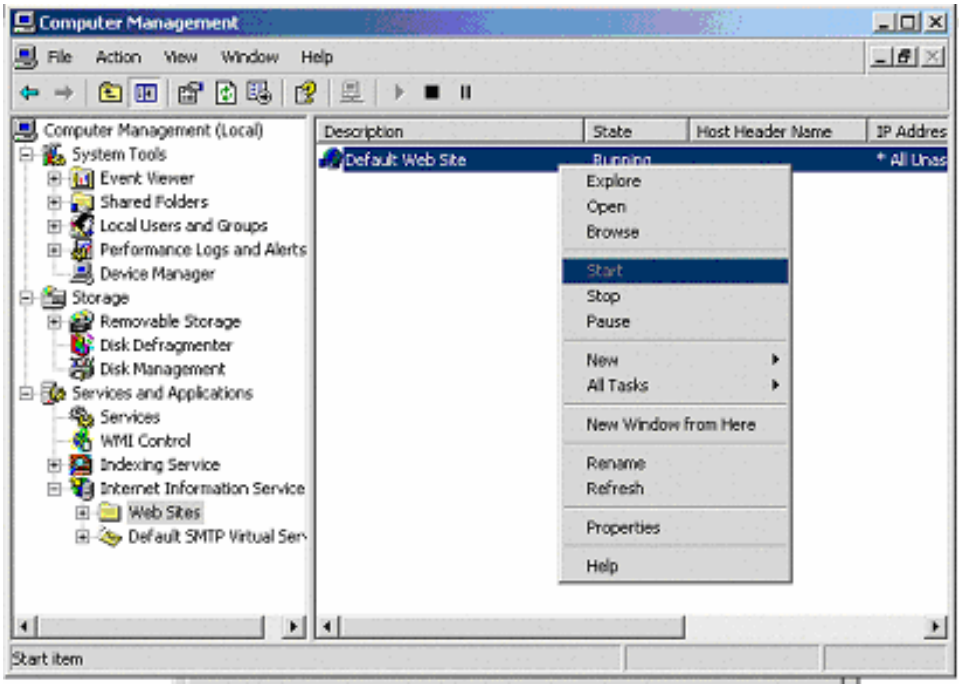

Figure 2-41. Default Web Site>Start

To Give Full Control Security Rights to IIS Server:

To ensure that the IIS web server has the necessary operating system rights to upload files in the DP/DashBoard document management option, a local user needs to be added with Full Control security rights. After starting the IIS web server, perform the following steps.

1. From the Windows main menu, <right-click> the **Start** button and select the **Explore** menu option.
2. From the left-side panel in the Windows Explorer screen, <right-click> the installation directory ***C:\inetpub\dpdash*** and select the **Properties** menu option. The dpdashboard Properties window displays.

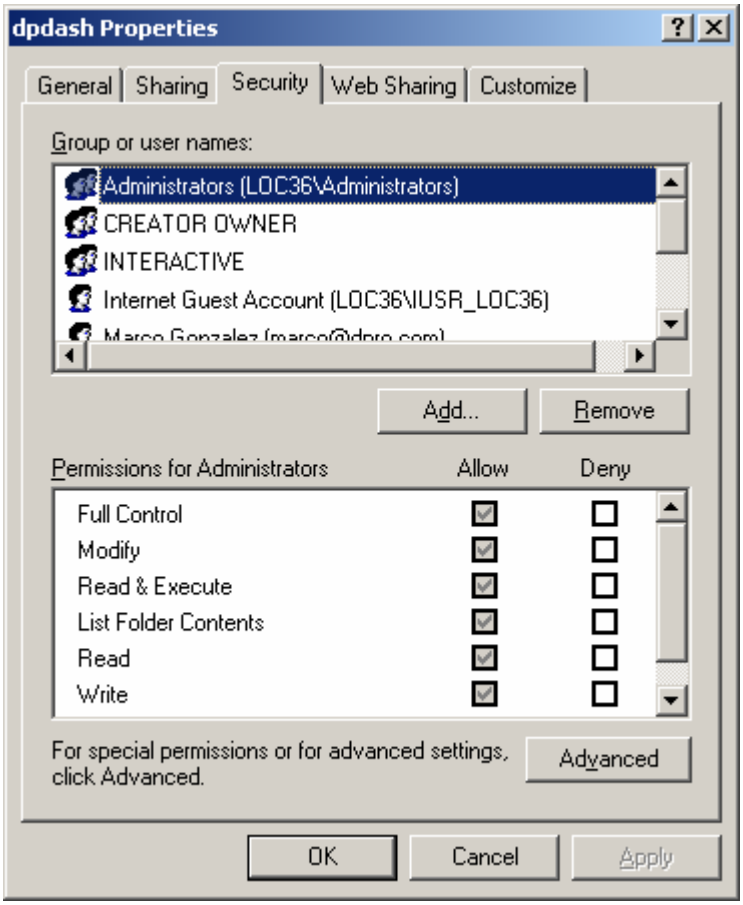

Figure 2-42. dpdash Properties Window – Security Tab

3. <Click> on the **Security** tab, and <click> the **Add** button. The Select Windows, Users, or Groups window displays.

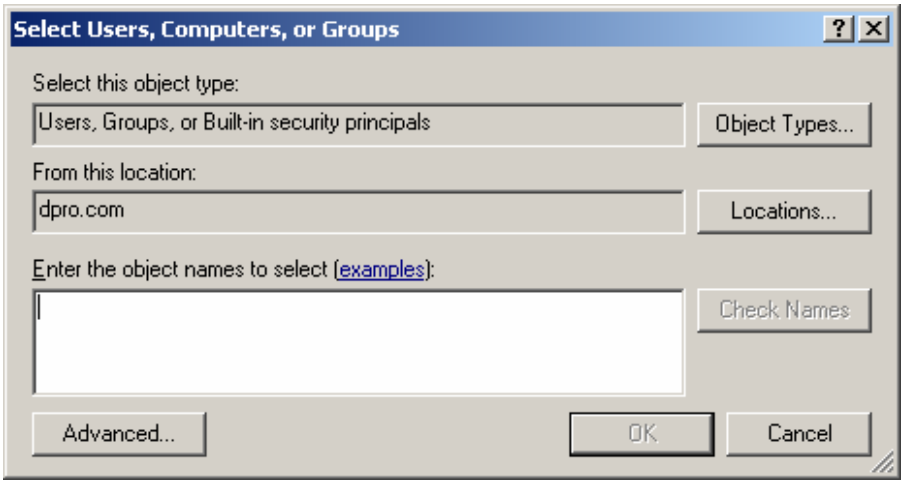

Figure 2-43. Select Users, Computers, or Groups Window

4. <Click> the **Locations…** button. The Locations window displays.

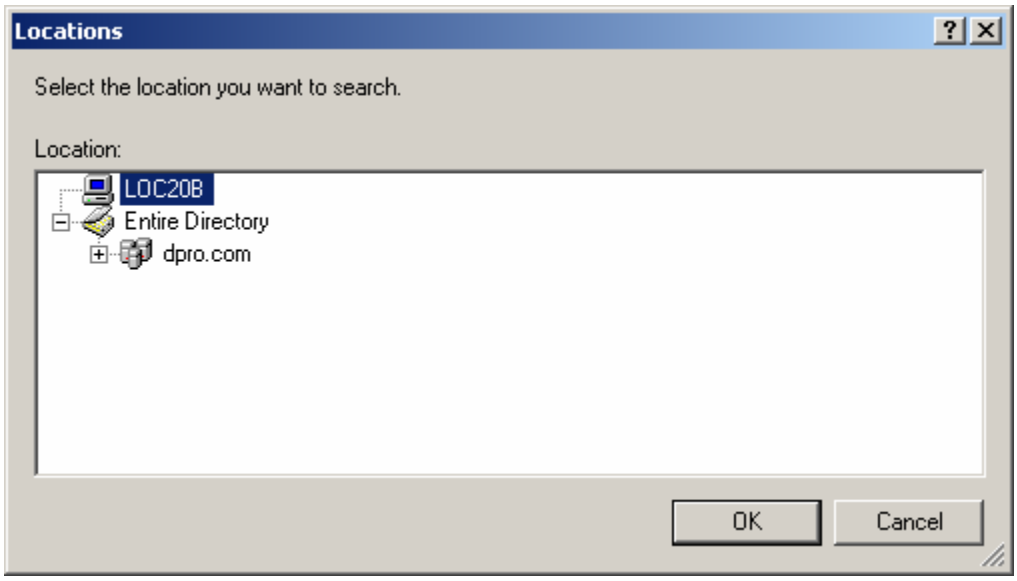

Figure 2-44. Locations Window

5. Select your local machine name and <click> the **OK** button. The Locations window closes and returns to the Select Windows, Users, or Groups window.
6. <Click> the **Advanced…** button. Additonal options display.

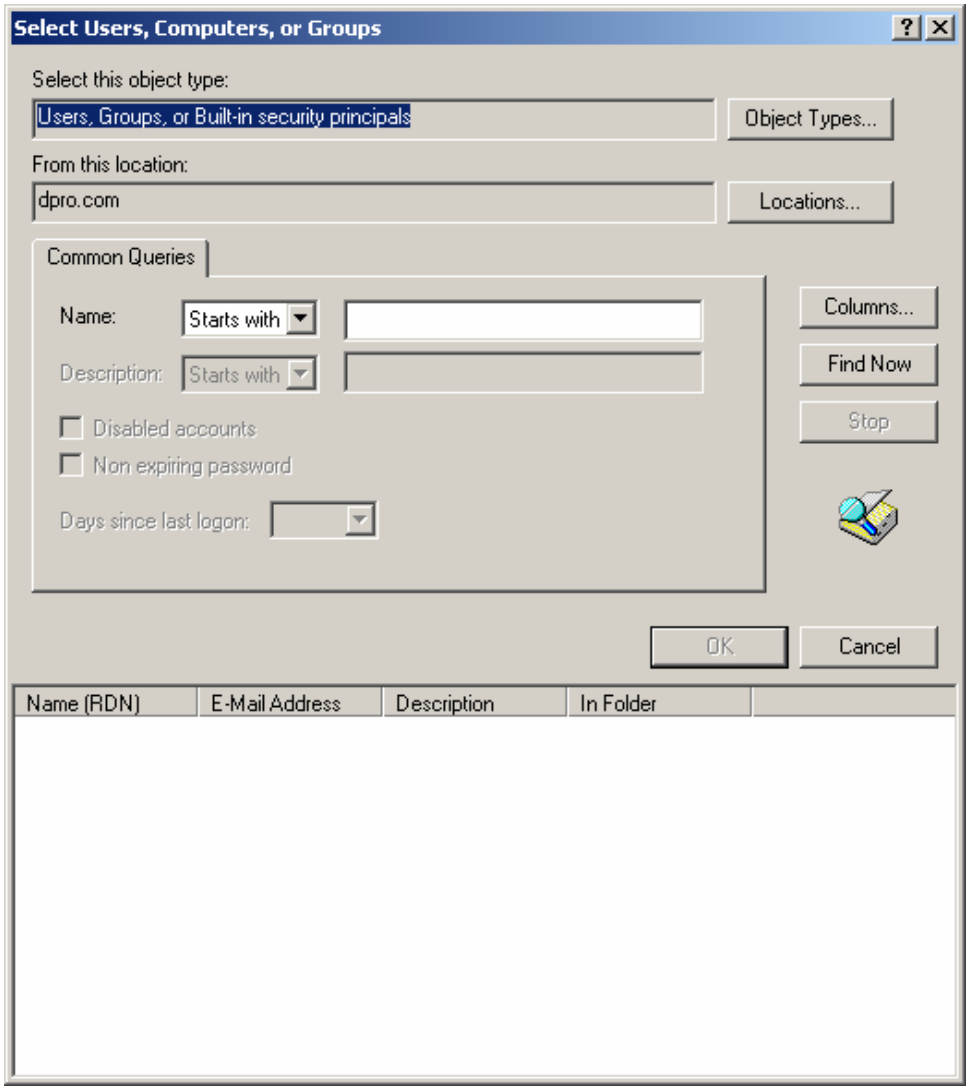

Figure 2-45. Select Users or Groups>Advanced Options

7. <Click> the **Find Now** button and select the ***IUSR_mymachinename*** user.

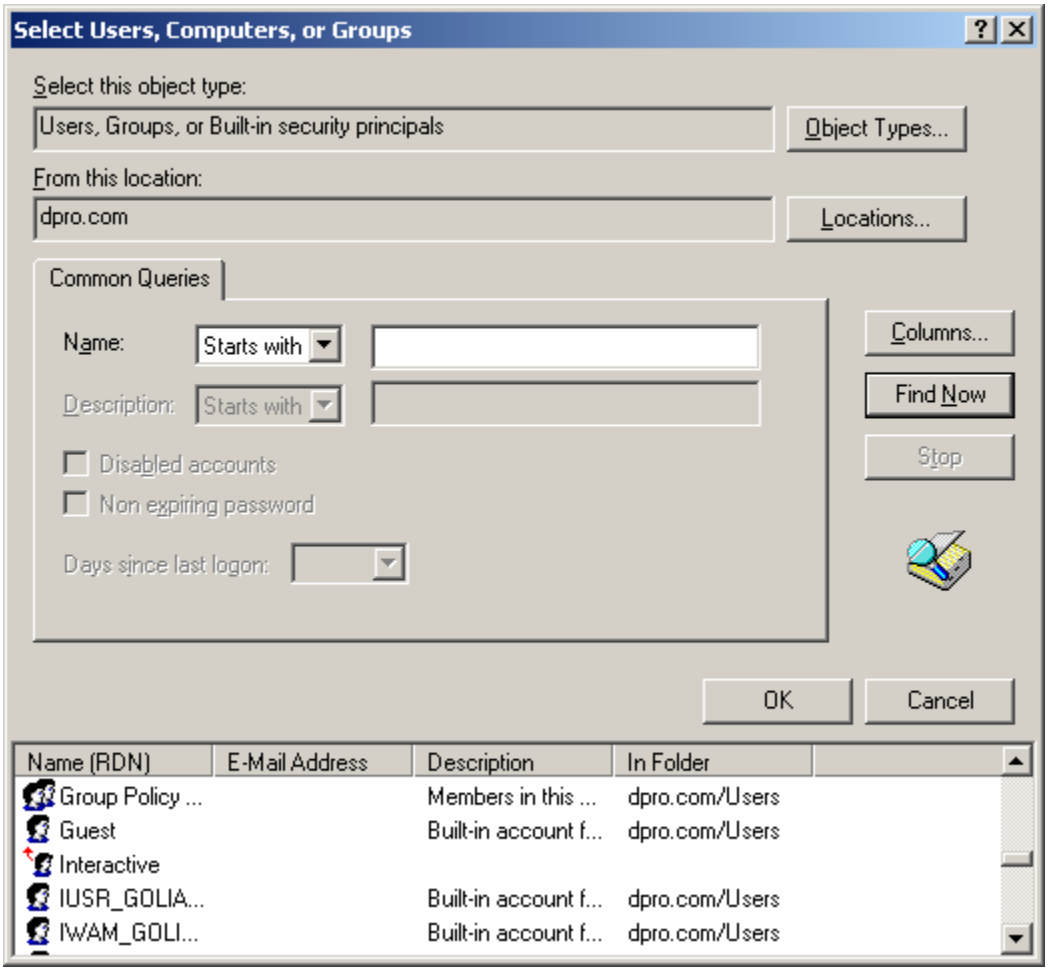

Figure 2-46. Select Users or Groups Window – Find Now Option

8. <Click> the **OK** button. The advanced options close and the selected machine name displays in the Enter Object Names to Select section of the window.
9. <Click> the **OK** button. The Select, Window, Users, or Groups window closes and retuns to the dpdashboard Properties Window.
10. <Click> the **Allow** check box for the Full Control option in the Permissions section of the dpdashboard Properties window. Verify a check mark displays in the check box.

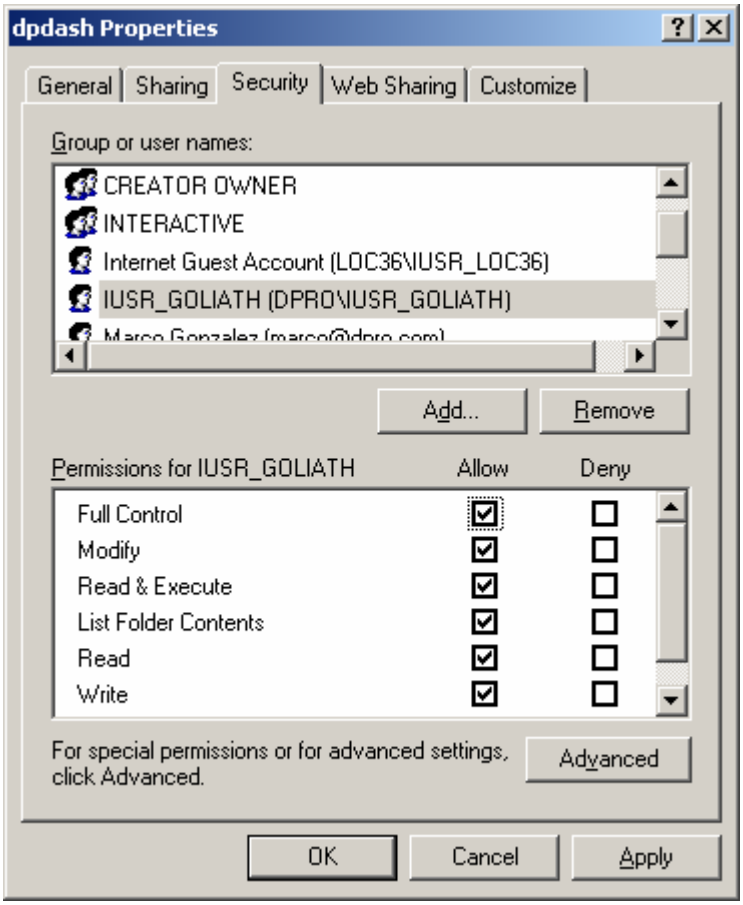

Figure 2-47. dpdash Properties – Allow Full Control Option

11. <Click> the **OK** button.

LAUNCH BROWSER AND ENTER URL OF DP/DASHBOARD SERVER

At this point, you are ready to configure **DP/DashBoard** and begin using it. Like the rest of the **Infinity POWER** accounting software product line, the **DP/DashBoard** system is controlled by the Advanced Security Administrator module. Users throughout the system only see what management decides that they should see, if anything at all. However, when you are in the setup phase, it is recommended that you login as the SYSADM user to ensure you have the security access necessary to completely configure the **DP/DashBoard** program.

It is also recommended that once the setup phase is complete, that you resort to another USER ID for day to day operation of the system. You may require full rights for some users such as owners and upper level managers to allow them complete access to all **DP/DashBoard** options.

To Start DP/DashBoard:

1. Launch a current version of the **Internet Explorer** or **Netscape Navigator** browser and enter the domain name (i.e. http://dpdashboard.dpro.com) or the **IP Address** (i.e. 80.153.123.85) of the web server machine that you have setup. This should load the initial login screen (Figure 2-48) of the **DP/DashBoard** system.

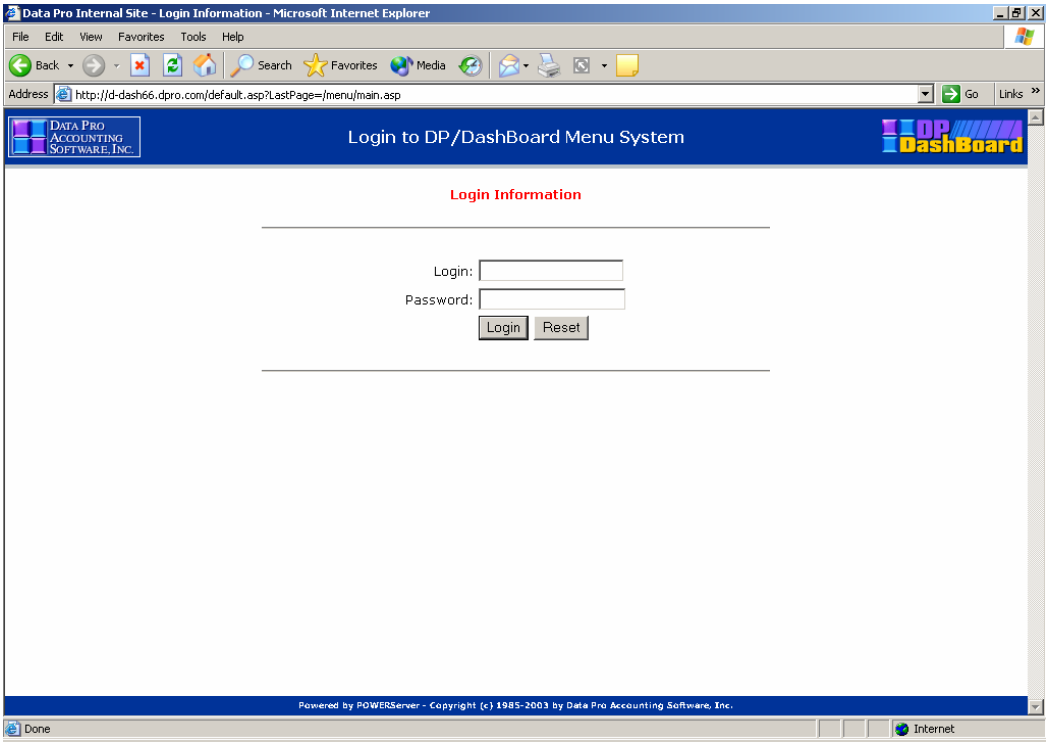

Figure 2-48. DP/DashBoard Initial Login Screen

2. Enter the user ID in the **Login** text box and the user password in the **Password** text box.
3. <Click> the **Login** button. The **DP/DashBoard** Menu System screen (Figure 2-49) displays.

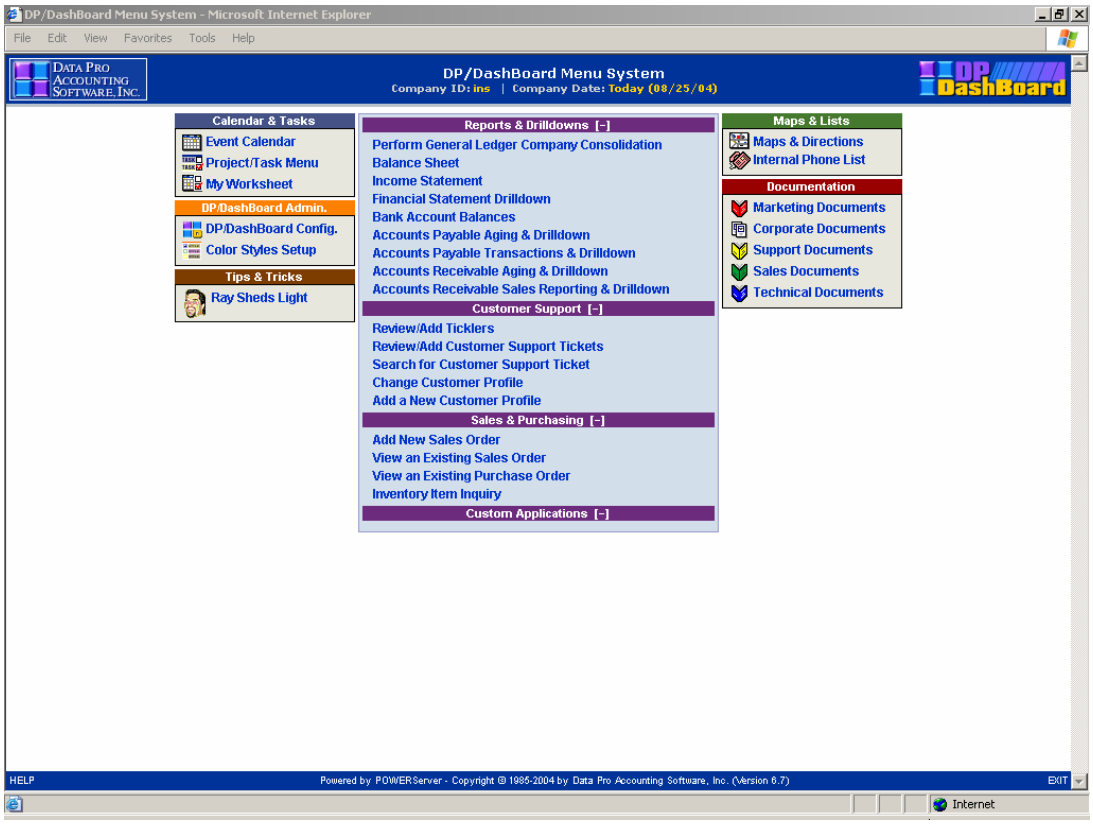

Figure 2-49. DP/DashBoard Menu System Screen

Now you can begin to drive your entire company's operations on a daily basis from your new Intranet system. It is time to configure **DP/DashBoard**. See the **DP/DashBoard Admin > DP/DashBoard Configuration Options** section of Chapter 3, for details on how to completely configure the **DP/DashBoard** system.

NOTE

If your **DP/DashBoard** system does not successfully launch after completing all the installation and configuration procedures, refer to Chapter 3, ***DP/DashBoard Troubleshooting Guide*** section for solutions to common problems. The Troubleshooting Guide section will be frequently updated.

Congratulations!!!

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CHAPTER 3 USING DP/DASHBOARD

This chapter describes the steps necessary to configure your DP/DashBoard and how to use its incredible features. The DP/DashBoard Menu System Screen (Figure 3-1) is divided into sections based on functionality.

Figure 3-1. DP/DashBoard Menu System Screen

The following table describes the breakdown of this chapter, and where you can find specific information.

Section in Chapter	What You Will Find
Calendar & Tasks	Overview and detailed procedures on how to use all the features in the Event Calendar and Project Management functions.
DP/DashBoard Admin	Overview and detailed procedures on how to configure your entire DP/DashBoard program. Functions include configuring all details of the event calendar/tasks, documentation management, maps and directions to your company, and color settings.
Reports & Drilldowns	Overview and detailed procedures on how to use all the features for running reports and performing drilldowns. Categories include: Perform General Ledger Company Consolidation, Balance Sheet, Income Statement, Financial Statement Drilldown, Bank Account Balances, Accounts Payable Aging and Drilldown, Accounts Payable Transactions & Drilldown, Accounts Receivable Aging and Drilldown, Accounts Receivable Sales Reporting & Drilldown.
Customer Support	Overview and detailed procedures on all customer support functions. Functions include: Review/Add Tickers, Review/Add Customer Support Tickets, Search for Customer Support Ticket By Number, Change Customer Profile.
Sales & Purchasing	Overview and detailed procedures on sales and purchasing functions. Functions include: Add a Sales Order, Review an Existing Sales Order, View an Existing Purchase Order, Inventory Item Inquiry.
Maps & Lists	This portion of the main menu options is user-defined, but comes standard with the following options: Maps & Directions and Internal Phone List. This is where you could put your company map so that it is accessible for your employees to print, email, or fax it to clients that wish to visit your facility. The internal phone list is self-generating as new users are added in the configuration options.
Documentation	This section of the main menu is user defined, but comes standard with the following options: Marketing Documents, Corporate Documents, Support Documents, Sales Documents, Technical Documents. This is where you could display documents/links related to these topics for your employees to access.
Tips & Tricks	This section of the main menu is user defined, but comes standard with Ray Sheds Light. This is where you could display document/links that are related to technical support issues, new product features, etc.

GENERAL FUNCTIONS

This section describes features of the DP/DashBoard interface that are consistent throughout the program screens.

Change Active Company

You can change the **"active company"** from any screen within the DP/DashBoard program. The following screen (Figure 3-2) illustrates this function.

Figure 3-2. Change Active Company Function

To Change the Active Company:

1. At the top of any DP/DashBoard screen, <click> on the **Company ID** in the main title bar. The Change Active Company screen (Figure 3-3) displays.

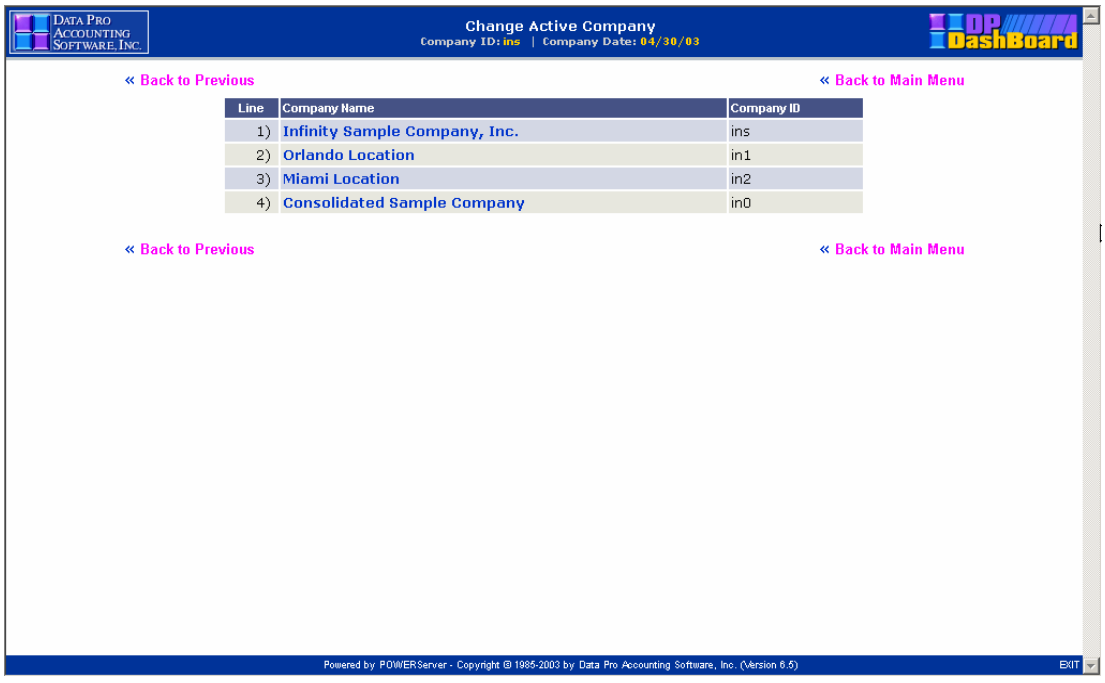


Figure 3-3. Change Active Company Screen

2. Select the desired company from the **Company Name** column. A message displays confirming the active company has been changed to the one selected.
3. Click the **Return to Menu** option. The Change Active Company Screen closes and returns to the DP/DashBoard Menu System screen.

Change System Date

You can change the **"system date"** that reflects your accounting date from any screen within the DP/DashBoard program. The following screen (Figure 3-4) illustrates this function.

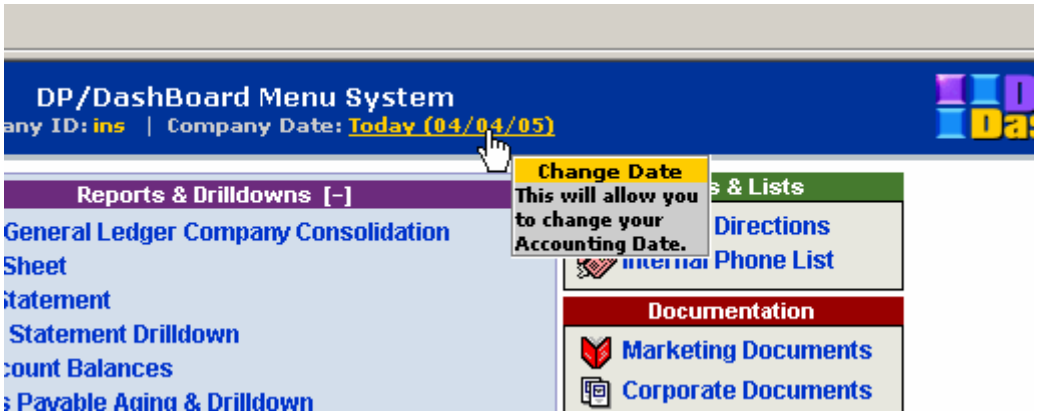


Figure 3-4. Change System Date Function

To Change the System Date:

1. At the top of any DP/DashBoard screen, <click> on the **Company Date** in the main title bar. The Change Accounting Date screen (Figure 3-5) displays.

Figure 3-5. Change Accounting Date Screen

2. <Click> the calendar icon next to the date display box to select the desired system date. Hint: <Click> on **<<** to change the month/year prior to the current date, or <click> **>>** to change the month/year after the current date. The calendar closes and the selected event date displays.
3. <Click> the **Change Date** button. The Change Accounting Date screen closes and returns to the DP/DashBoard Menu System screen, reflecting the new date at the top of the screen.

OR

4. <Click> the **Change to Today's Date** button to change the system date to the current date. The Change Accounting Date screen closes and returns to the DP/DashBoard Menu System screen, reflecting the current date at the top of the screen.

Pop-Up Menu

You can access a pop-up menu from any screen within the DP/DashBoard program. The pop-up menu provides quick access to all the features of the DP/DashBoard Menu System screen including Reports & Drilldowns, Customer Support, Custom Applications, Calendar, Admin, Tips & Tricks, Maps & Lists, and Documentation.

The following screen (Figure 3-6) illustrates this function.

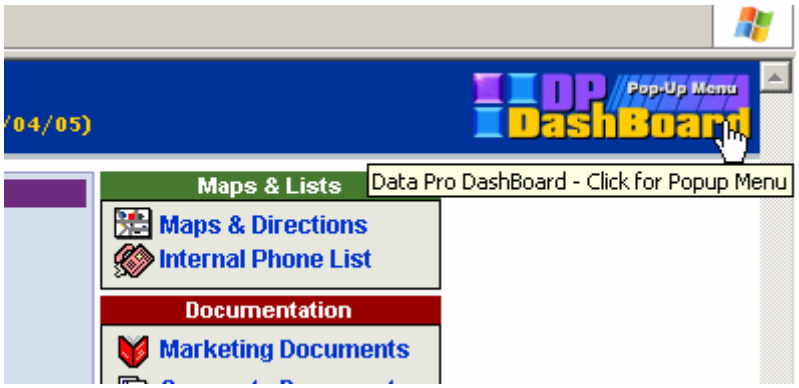


Figure 3-6. Access Pop-Up Menu Function - Example

To Access the Pop-Up Menu:

1. At the top right of any DP/DashBoard screen, <click> on the **Company Logo** in the title bar. The Pop-Up Menu displays.

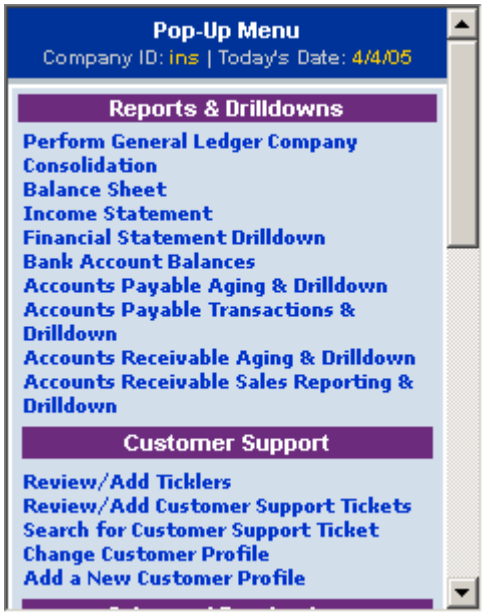


Figure 3-7. Pop-Up Menu

DP/DASHBOARD ADMIN.

The **DP/DashBoard Admin.** section of the DP/DashBoard Menu System screen consists of the **DP/DashBoard Config.** and **Color Styles Setup** options. Users MUST have administration rights to access these menu options.

Keep in mind that most options may be removed through Advanced Security limitations which are turned on and off through the Advanced Security Administrator module. If you wish to specifically tune these features at this time, go to the **Infinity POWER** System Administrator module and check the documentation on how to control user and group rights to specific options.

Otherwise, this section and the following sections are designed to explain your ability to configure the **DP/DashBoard** system with all of its variations and possibilities. Remember, that unless you have the specific **Infinity POWER** accounting modules installed detailed earlier in the requirements section of this manual, some of the accounting options seen here will not appear on your system. You must have all of the corresponding accounting applications installed and running on your system for them to properly integrate with the **DP/DashBoard** product. This includes accounting modules such as General Ledger, Accounts Payable, Check Reconciliation and Accounts Receivable.

NOTE

Keep in mind if you decide not to deploy all of these features, they will not automatically appear without their proper installation in the accounting system too.

The system can be configured to meet your company's specific needs. This includes setting up a wide range of pieces of information including Departments, Users, Calendar Resources, Company Addresses and Phone Numbers, Corporate Logos, documents, and much more.

The following screen (Figure 3-8) illustrates the section in the upper left hand corner of the screen where these options are displayed.

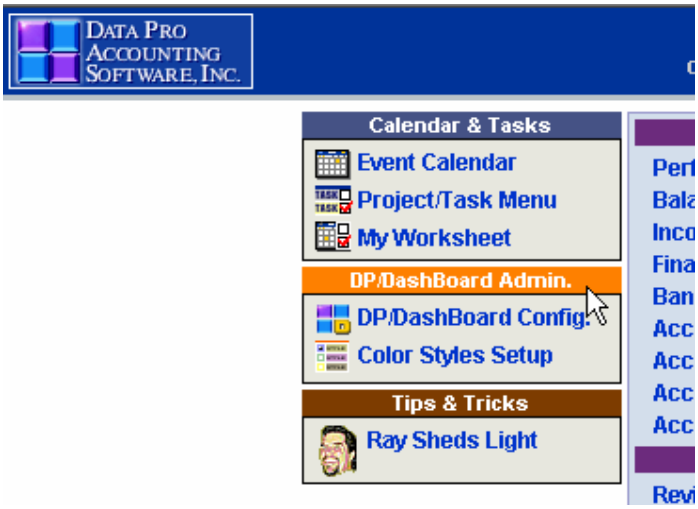


Figure 3-8. DP/DashBoard Admin Section

DP/DashBoard Config Options

The **DP/DashBoard** Config Options section of the **DP/DashBoard Menu System** screen provides the capability to setup global configurations, departments, new users, corporate resources, company documents, and other customizable options. This section assumes that you have logged into the **DP/DashBoard** program with complete rights and intend to view all options.

To Access the Configuration Options Screen:

1. On the left side of the DP/DashBoard Menu System screen, select the **DP/DashBoard Config** option from the DP/DashBoard Admin. section. The DP/DashBoard Administration Menu screen (Figure 3-9) displays.

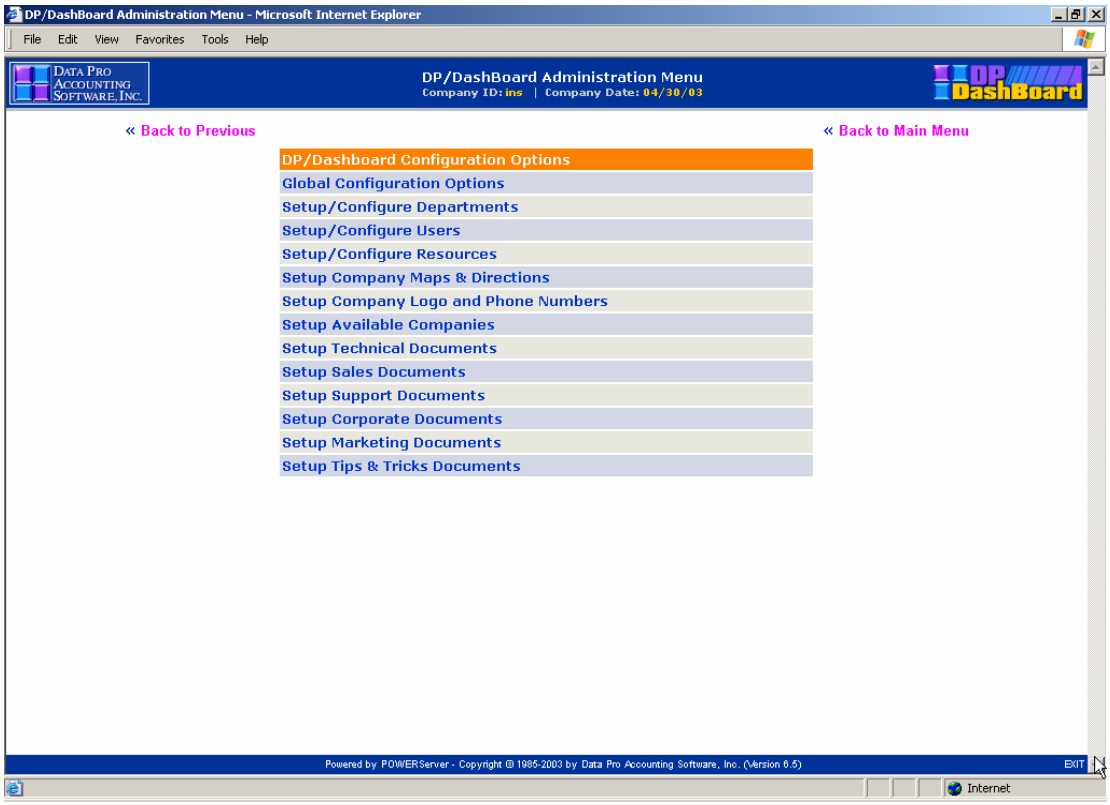


Figure 3-9. DP/DashBoard Administration Menu Screen

Global Configuration Options

This configuration option allows you to setup global options for the calendar and project/task functions that are viewed from the Calendar & Tasks section of the **DP/DashBoard Menu System** screen.

The Global Configuration options section deals with the configuration and design of the Event Calendar and Project/Task Manager programs which are included as standard features within the **DP/DashBoard** system. These are very powerful tools that are designed to allow for company wide use. This includes a single calendaring tool for a single office or even multiple offices as well as a Project Task Management system designed to allow you to keep track of a variety of things to be done, both personally and professionally.

The Calendar Configuration defines the Category pull-down menus accessed in the Calendar screen and from the Add New Event screen. The Project/Task Configuration defines the pull-down menu accessed in the Add New Event or Change Event screens.

The following screen (Figure 3-10) illustrates the section in the left right hand corner of the screen where these options are displayed.

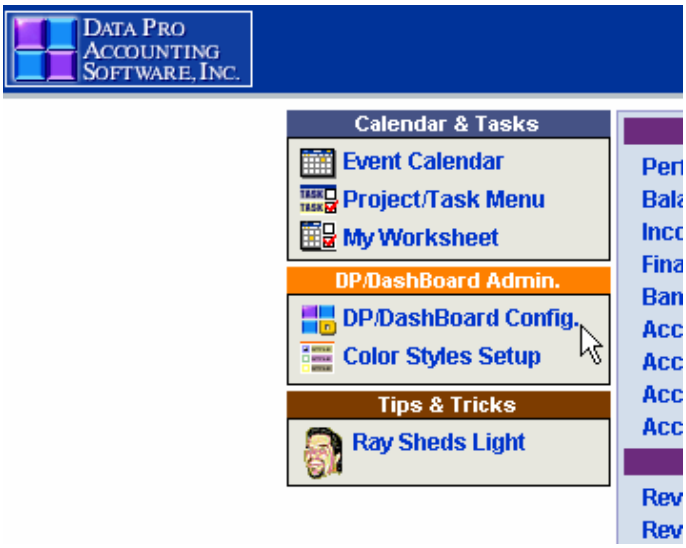


Figure 3-10. DP/DashBoard Admin>DP/DashBoard Config

To Setup/Modify Global Configuration Options:

1. From the DP/DashBoard Administration Menu screen (Figure 3-9), select the **Global Configuration Options** menu option. The Calendar/Project Global Configuration screen (Figure 3-11) displays.

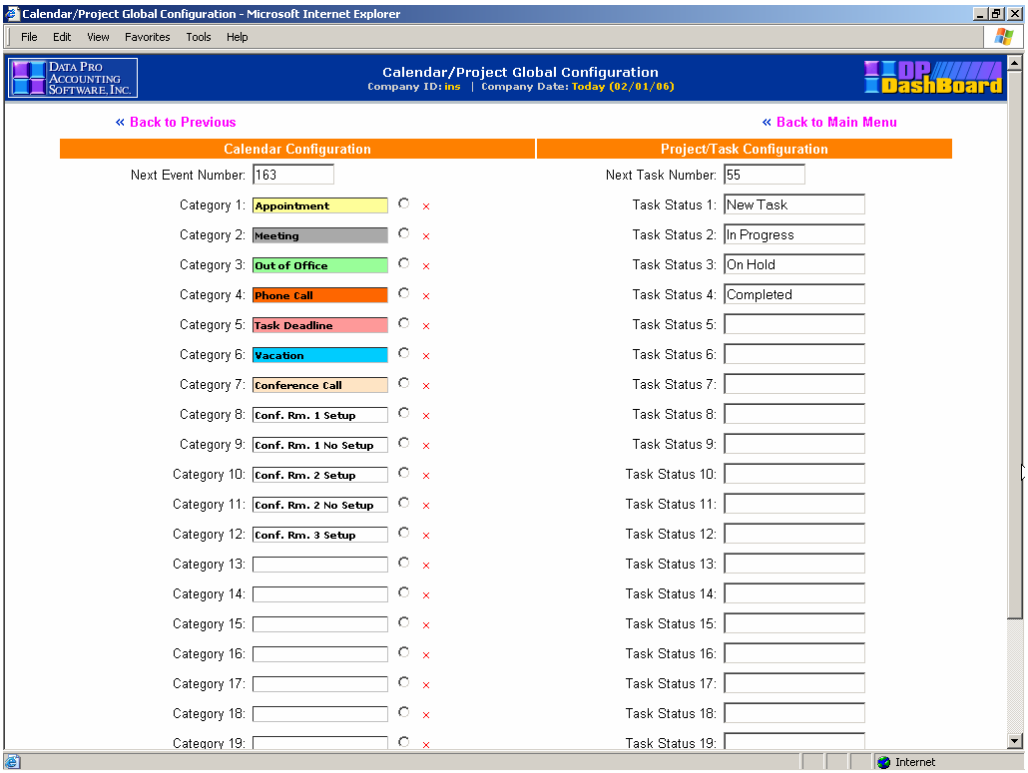


Figure 3-11. Calendar/Project Global Configuration Screen

The following table describes the **Calendar/Project Global Configuration** screen details:

Next Event Number	Text box that defines the next event number. Automatically increments to the next consecutive number. When performing the configuration for the first time, the event number begins with 1.
Category	Tex box that defines the listed items in the Category pull-down menu in the Calendar and the Add/Change Event screens.
Next Task Number	Text box that defines the next task number. Automatically increments to the next consecutive number. When performing the configuration for the first time, the task number begins with 1.
Task Status	Tex box that defines the listed items in the Task Status pull-down menu in the Add/Change Event screens.
Color Selection Radio Button	Click the color selection radio button next to the associated event to assign an event color. (ex: Select blue for Vacation). These event colors display in the Event Calendar when you select the Category pull-down menu when scheduling an event. Scheduled events display in the assigned category color so that events are easy to recognize.
(Remove Color) ✕	Click the red “x” to remove the color selection and return to the default of “no color”.

2. Enter a new category in the next available **Category** text box, or type over an existing category definition to modify one.

3. If you want to assign an event color to associate to the category, click the radio button next to the desired Category and select the desired color from the Color Palette (Figure 3-12). The default is no color.

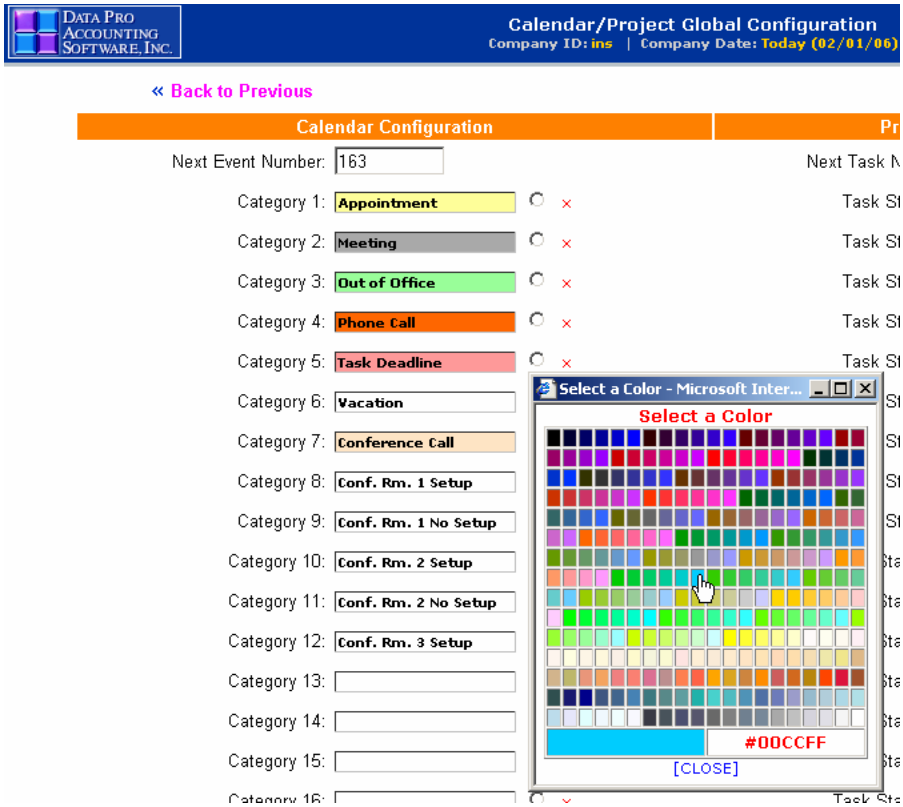


Figure 3-12. Select Event Color

Color Selection Radio Button	Click the color selection radio button next to the associated event to assign an event color. (ex: Select blue for Vacation). These event colors display in the Event Calendar when you select the Category pull-down menu when scheduling an event. Scheduled events display in the assigned category color so that events are easy to recognize.
(Remove Color) ✕	Click the red "x" to remove the color selection and return to the default of "no color".

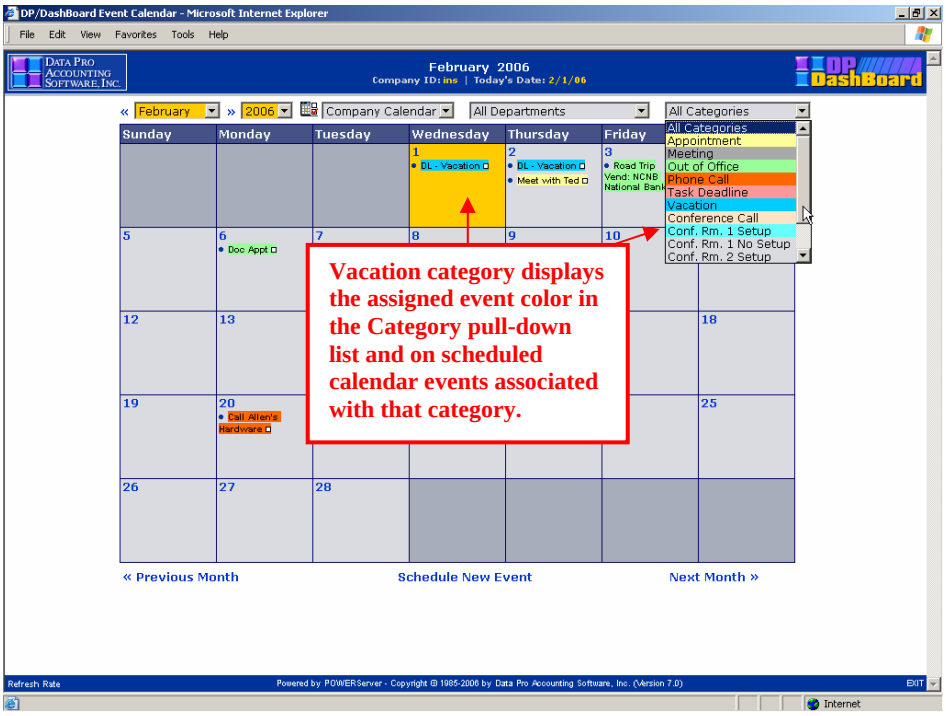


Figure 3-13. Example Color Event – Vacation Category

4. Enter a new task in the next available **Task Status** text box, or type over an existing task status definition to modify one.
5. <Click> the **Save** button. A message displays confirming the configuration record has been updated. The window closes and returns to the DP/DashBoard Administration Menu screen.

Setup/Configure Departments

This set of options allows the setup and configuration of Departments, which are throughout the **DP/DashBoard** program. For instance, departments are used specifically as new users are added into the system and their associated departments are assigned, which automatically updates the corporate phone list with this information. The departments defined also display in the pull-down menus of the Event Calendar and Project Task Menu screens to select a specified department for those functions. Departments can be added, modified, and deleted.

To Access the Setup/Configure Departments Screen:

1. From the **DP/DashBoard** Administration Menu screen (Figure 3-9), select the **Setup/Configure Departments** menu option. The Setup/Configure Departments screen (Figure 3-14) displays.

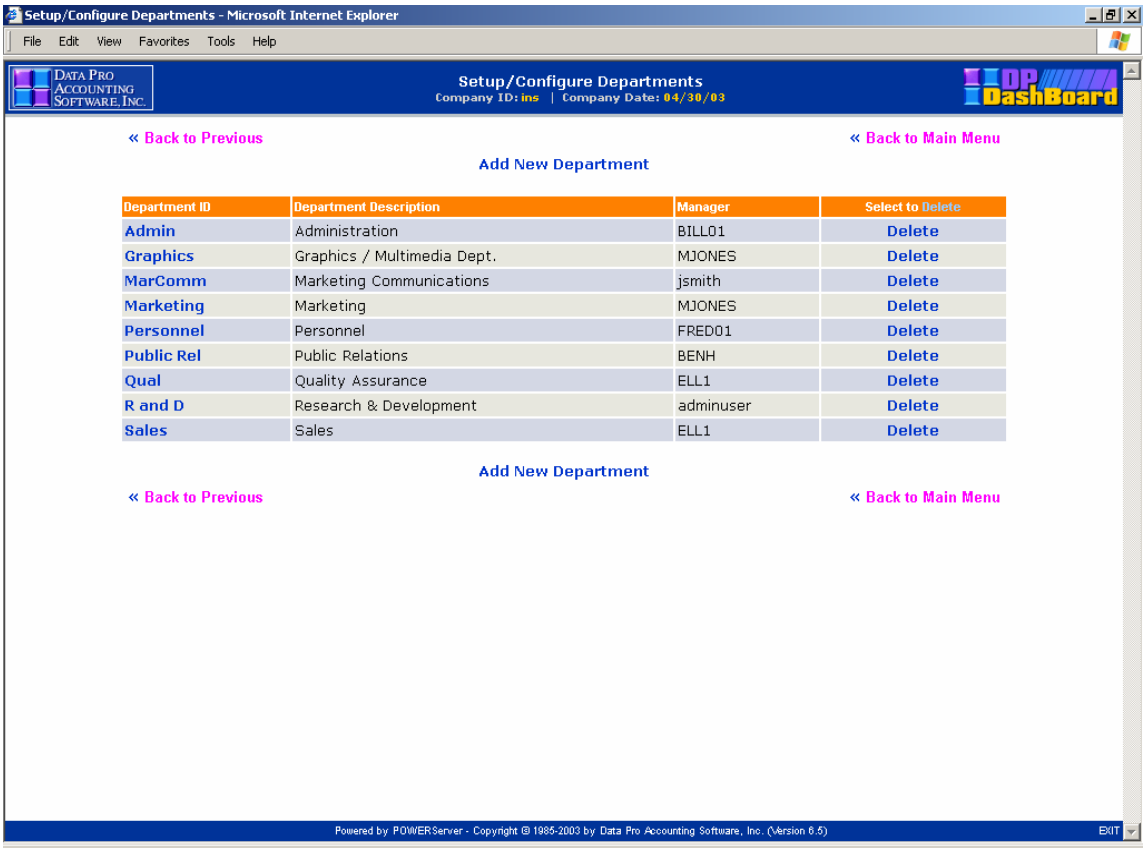


Figure 3-14. Setup/Configure Departments Screen

The following table describes the **Setup/Configure Departments** screen details:

Department ID	Maximum of 11alpha/numeric characters. Abbreviation of the department (e.g. PubRel for Public Relations).
Department Description	Maximum of 28 alpha/numeric characters. Full name of the department (e.g. Marketing).
Manager	Name of user (with manager permissions) assigned to the department.
Select to Delete	Selecting a component in this column deletes the associated department from the **DP/DashBoard** system database.

To Add a Department:

This option allows you to add a new department to the database. This is immediately reflected throughout the **DP/DashBoard** system.

1. From the Setup/Configure Departments screen (Figure 3-14), <click> the **Add New Department** option. The Add New Department screen (Figure 3-15) displays.

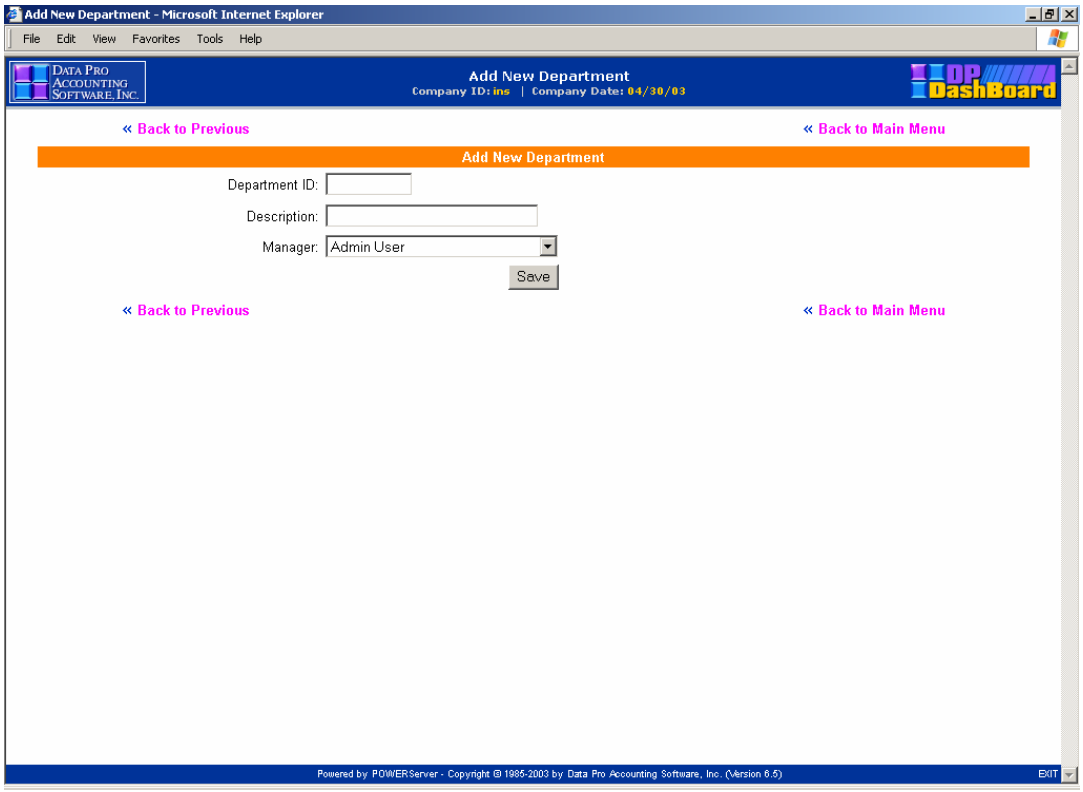


Figure 3-15. Add New Department Screen

2. Enter the desired department identification in the **Department ID** text box. This is a maximum of eleven (11) alpha/numeric characters.
3. Enter a description of the department in the **Description** text box. This is a maximum of twenty-eight **(28)** alpha/numeric characters.
4. Select the appropriate user to assign management responsibilities for the department from the **Manager** pull-down menu.
5. <Click> the **Save** button. A message displays confirming the database records have been updated. The window closes and returns to the Setup/Configure Departments screen (Figure 3-14) where the new department is now listed.

To Modify a Department:

This option allows you to change information associated with an existing department (e.g. change the name of the department or assign a new manager).

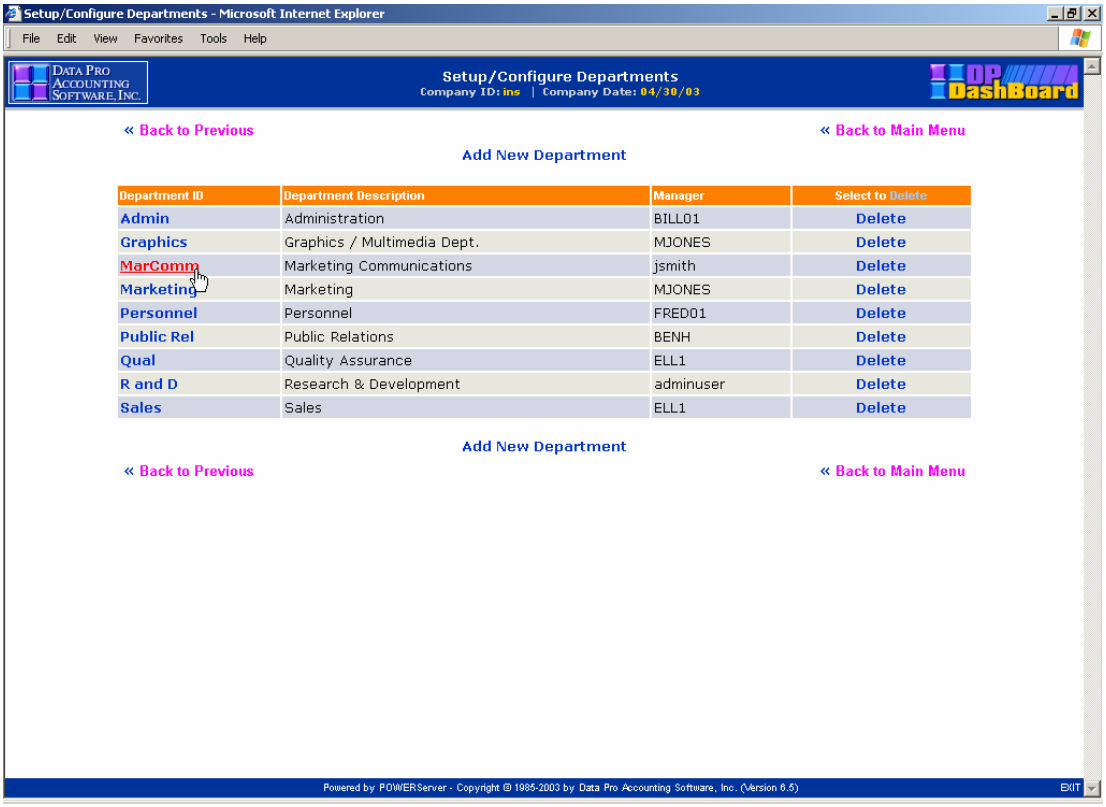


Figure 3-16. Setup/Configure Departments Screen – Modify Function

1. From the Setup/Configure Departments screen,<click> the department in the **Department ID** column to be modified (Figure 3-16). The Changing Department screen (Figure 3-17) displays, reflecting the name of the department selected.

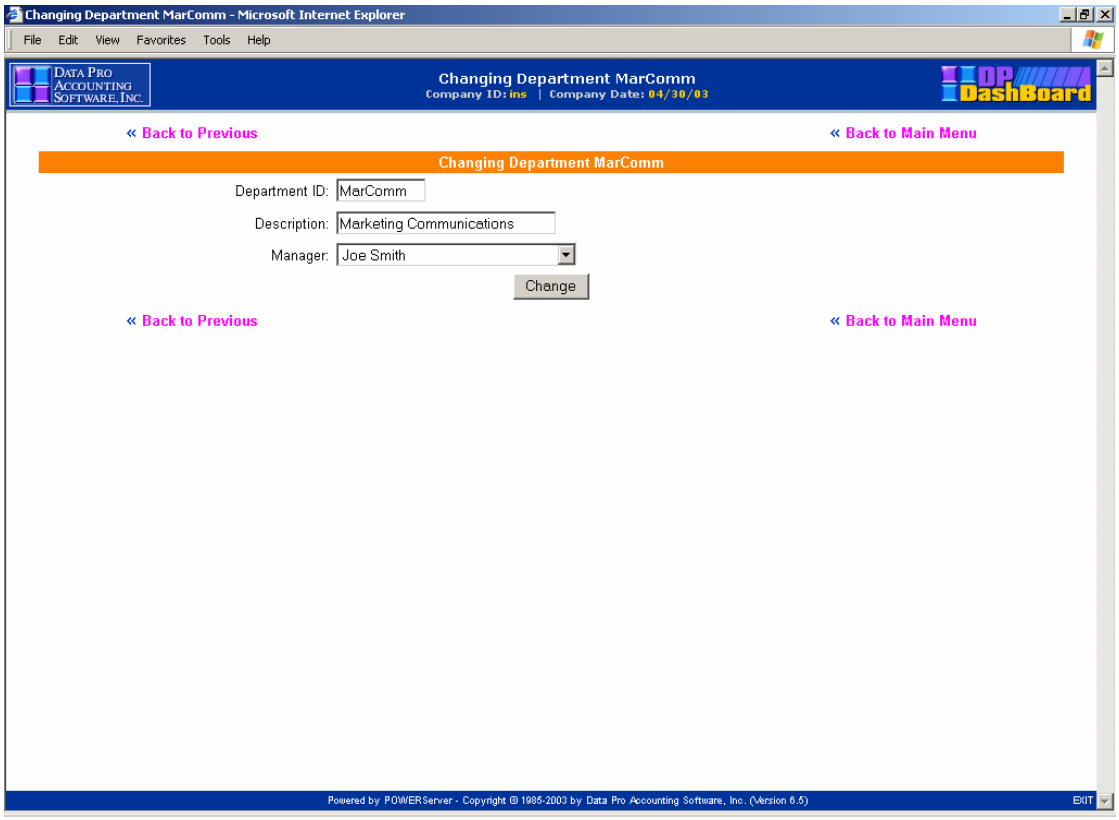


Figure 3-17. Changing Department Screen

2. Make desired changes to the department description in the **Description** text box.
3. To assign a different manager to the department, select another user from the **Manager** pull-down menu.
4. <Click> the **Change** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Departments (Figure 3-14) screen where the changes are now listed.

To Delete a Department:

This option allows you to delete an existing department from the **DP/DashBoard** database. Once a department is deleted it is not longer available throughout the system where departments are applicable.

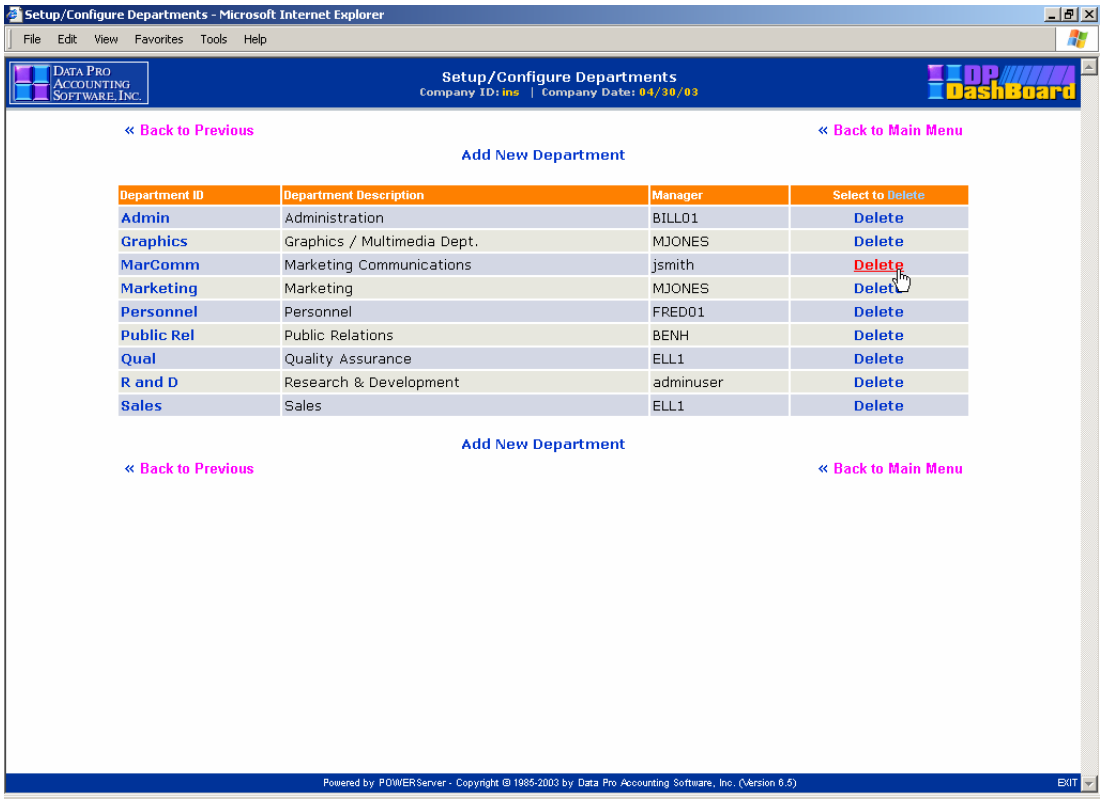


Figure 3-18. Setup/Configure Departments Screen – Delete Function

1. From the Setup/Configure Departments screen, <click> **Delete** from the **Select to Delete** column for the desired department to be deleted (Figure 3-18). A dialog box displays requesting confirmation to delete the selected department.
2. <Click> the **OK** button in the dialog box to complete the delete function. The dialog box closes and returns to the Setup/Configure Departments screen where the department is now deleted.

Setup/Configure Users

This option is essential in configuring new users in the system. Adding users automatically includes their information in the Company Phone List. It also provides them rights to use the Event Calendar and Project Management System.

NOTE

If the Customer Support Management system is deployed, it also needs to be configured to synchronize with the salesman file in the Accounts Receivable system so that accurate billing credits are reported between the two systems.

To Access the Setup/Configure Users Screen:

1. From the **DP/DashBoard** Administration Menu screen (Figure 3-9), select the **Setup/Configure Users** menu option. The Setup/Configure Users screen (Figure 3-19) displays.

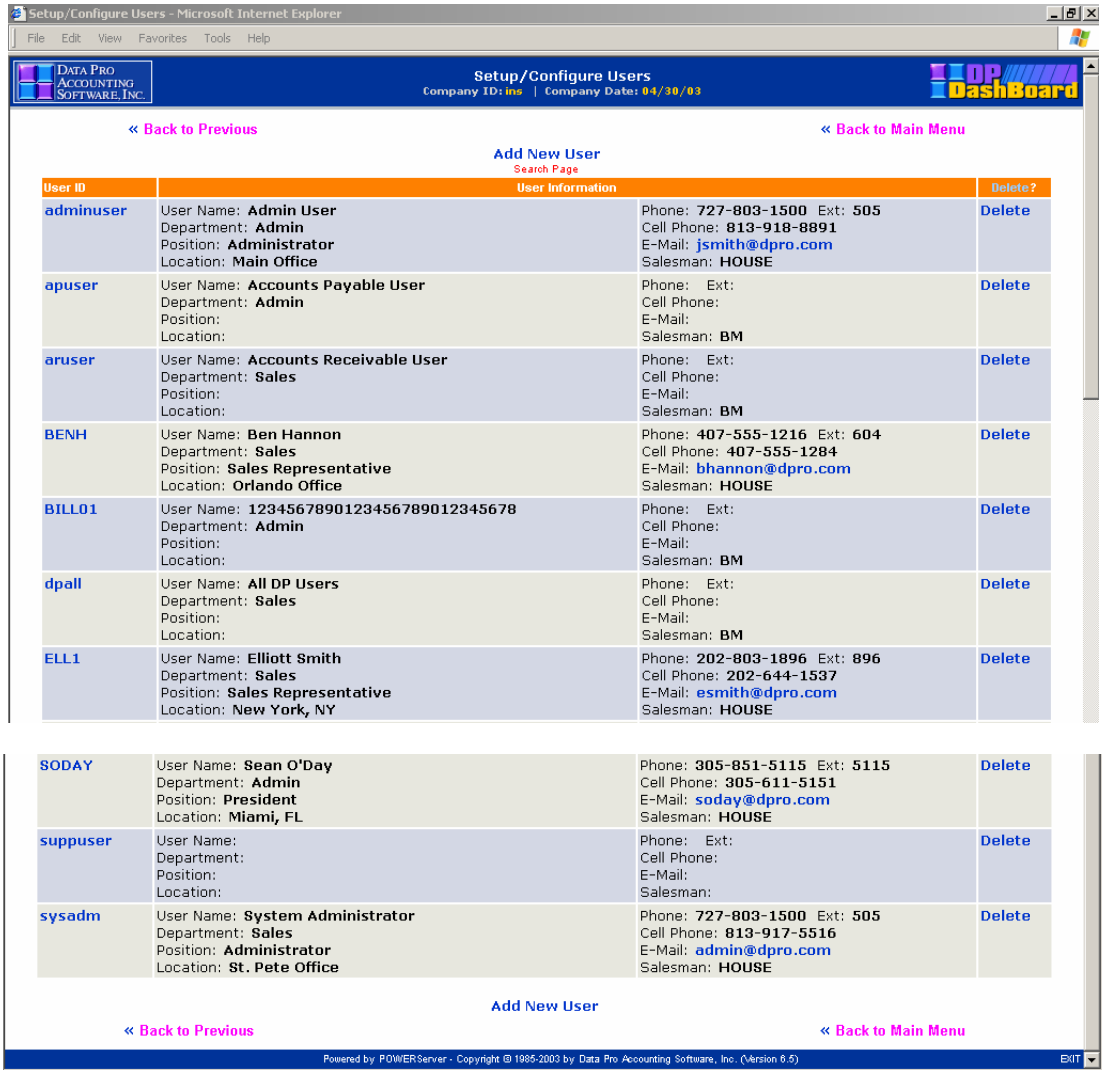


Figure 3-19. Setup/Configure Users Screen

The following table describes the **Setup/Configure Users** screen details:

User ID	Maximum of 11 alpha/numeric characters. Abbreviation of the user's name for login and identification purposes.
User Information	Detailed information about the user such as name/position, contact, and location information.
Delete?	Selecting a component in this column deletes the associated user from the **DP/DashBoard** system database.

To Add a New User:

This option allows you to add a new user to the **DP/DashBoard** system database.

1. From the Setup/Configure Users screen (Figure 3-19), <click> the **Add New User** option. The Add New User screen displays (Figure 3-20).

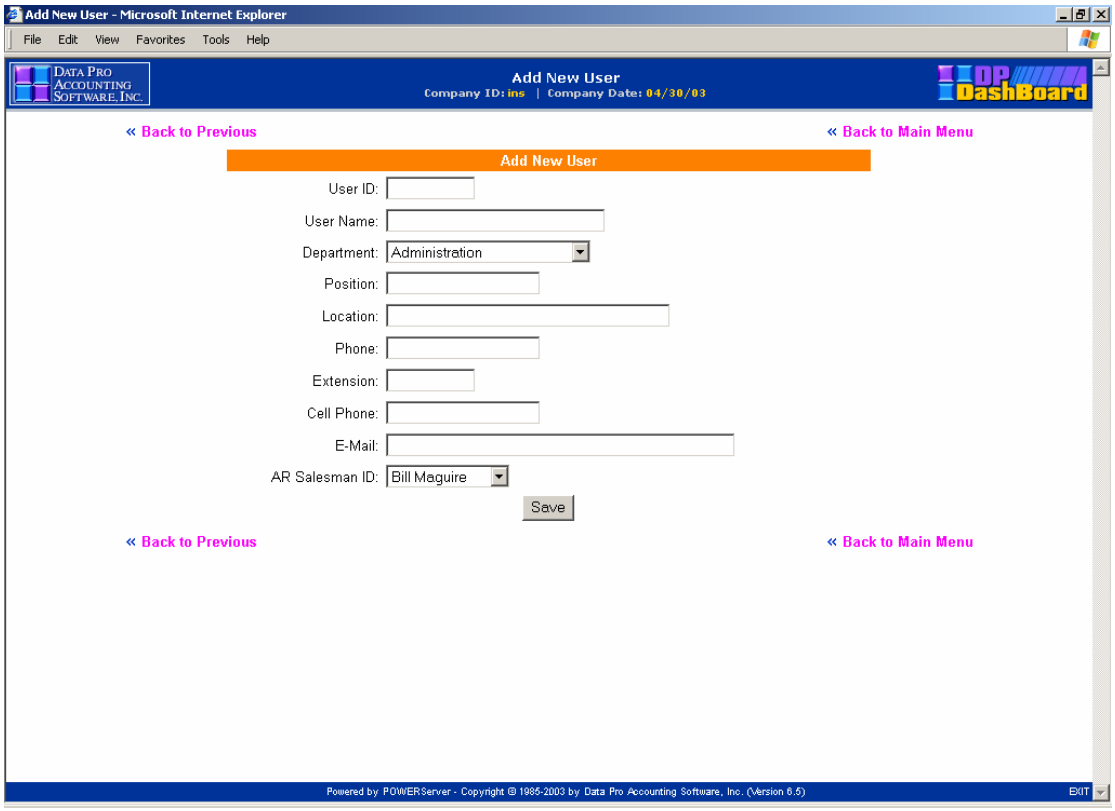


Figure 3-20. Add New User Screen

The following table describes the **Add New User** screen details:

User ID	Maximum of 11 alpha/numeric characters. Abbreviation of the user's name for login and identification purposes.
User Name	Detailed information about the user such as name/position, contact, and location information.
Department	Pull-down menu. Select the department the user is associated with.
Position	Maximum of 20 alpha/numeric characters. Describes the employee's position or title within the company.
Phone	Maximum of 20 alpha/numeric characters. Allows for the entry of the contact phone number for the employee. This can include a **"country code"** if outside the country. It is recommended that a standardized format be established within your company (e.g. use of hyphens versus parenthesis) for entering phone numbers.

Extension	Maximum of 11 alpha/numeric characters. The extension is separate so that each user's private phone number can be stored separately.
Cell Phone	Maximum of 20 alpha/numeric characters. Optional field providing cell phone number of the employee.
E-mail	E-mail address of the employee. This is important to setup for all users so that when using the calendar function, a user can automatically be emailed a notification if scheduled to attend a meeting. This function is not possible without an e-mail address.
AR Salesman ID	If using the Customer Support Management feature in **DP/DashBoard**, the Accounts Receivable (AR) module needs to be installed and AR Salespeople need to be added to the AR system. This means you intend to allow them to bill for Support Tickets and other items in the system. This field creates a link between the User ID and the AR Salesman file so that if transactions occur, there is relationship pre-established for billing purposes. **NOTE:** A single Salesman called **"House"** or **"Do not Use"** should be setup for users that have no link to billing. If the Salesman has not been setup, you can select **"House"** for the time being, save the User ID and go the AR module and add the new Salesman number. Return to this option to change the AR Salesman ID to coordinate with the new Salesman number.

2. Enter the new user identification in the **User ID** text box.
3. Enter the name of the user if the **User Name** text box.
4. Select the department the user is associated with from the **Department** pull-down menu.
5. Enter the position or title of the user in the **Position** text box.
6. Enter the location of the user in the **Location** text box.
7. Enter the user's contact information in the **Phone**, **Extension**, **Cell-Phone**, and **E-mail** text boxes.
8. If the user will be using the Customer Support Management feature, select the AR Salesman ID from the **AR Salesman ID** pull-down menu.
9. <Click> the **Save** button. A message displays confirming the database records have been updated, closes, and returns to the Setup/Configure Users screen (Figure 3-19) where the new user is now listed.

To Modify a User:

This option allows you to modify information for an existing user in the **DP/DashBoard** system database.

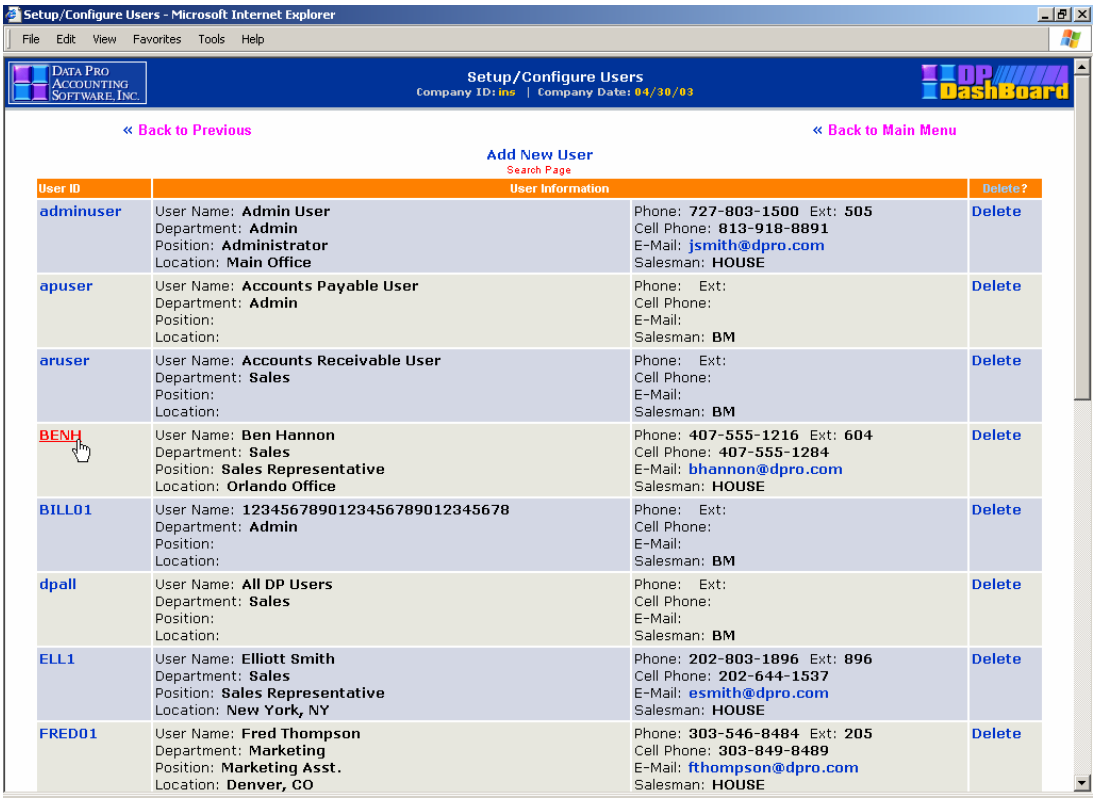


Figure 3-21. Setup/Configure Users Screen – Modify Function

1. From the Setup/Configure Users screen (Figure 3-19), <click> the user in the **User ID** column (Figure 3-21) to be modified. The Changing User screen displays (Figure 3-22).

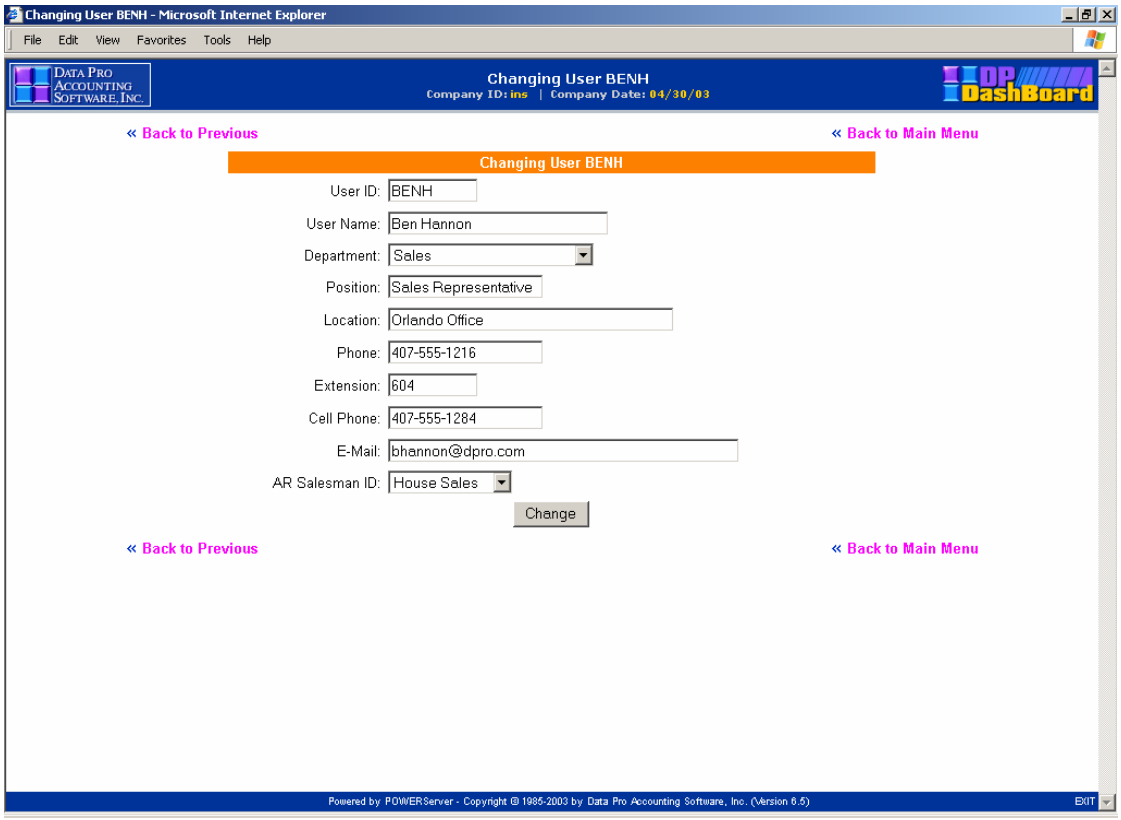


Figure 3-22. Changing User Screen

2. Make any desired changes in the appropriate text boxes and pull-down menus.
3. <Click> the **Change** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Users (Figure 3-19) screen where the changes are now listed.

To Delete a User:

This option allows you to remove a user from the **DP/DashBoard** system database. Once a user is deleted from the system, they will no longer have access to the Calendar, Project Management, or other functions associated with users within the program. The Company Phone List automatically removes a user from the list if they are deleted from the database.

Figure 3-23. Setup/Configure Users Screen – Delete Function

1. From the Setup/Configure Users screen, < click> **Delete** from the Delete column (Figure 3-23) for the desired user to be deleted. A dialog box displays requesting confirmation to delete the selected user.
2. <Click> the **OK** button in the dialog box to complete the delete function. The dialog box closes and returns to the Setup/Configure Users screen (Figure 3-19) where the user is now deleted.

Setup/Configure Resources

This option is designed to create and manage **"resources"** that will be used throughout the Event Calendar system. These resources are limited only to your imagination since every organization is different. However, there are common items that could be found in many companies.

Resources such as conference rooms, projectors, screens, notebook computers, are commonly shared by various individuals within an organization. Therefore, this option provides for the ability to set these items up as a **"resource"** so that they may be tracked and scheduled, much like individuals, to compare for any possible conflicts within the Event Calendar system. It is not unlikely for an organization to want to book multiple meetings at the same time and not have enough meeting facilities to accommodate all requirements. This is a major function the Event Calendar utility can assist any organization in coordinating.

To Access the Setup/Configure Resources Screen:

1. From the DP/DashBoard Administration Menu screen (Figure 3-9), select the **Setup/Configure Resources** menu option. The Setup/Configure Resources screen (Figure 3-24) displays.

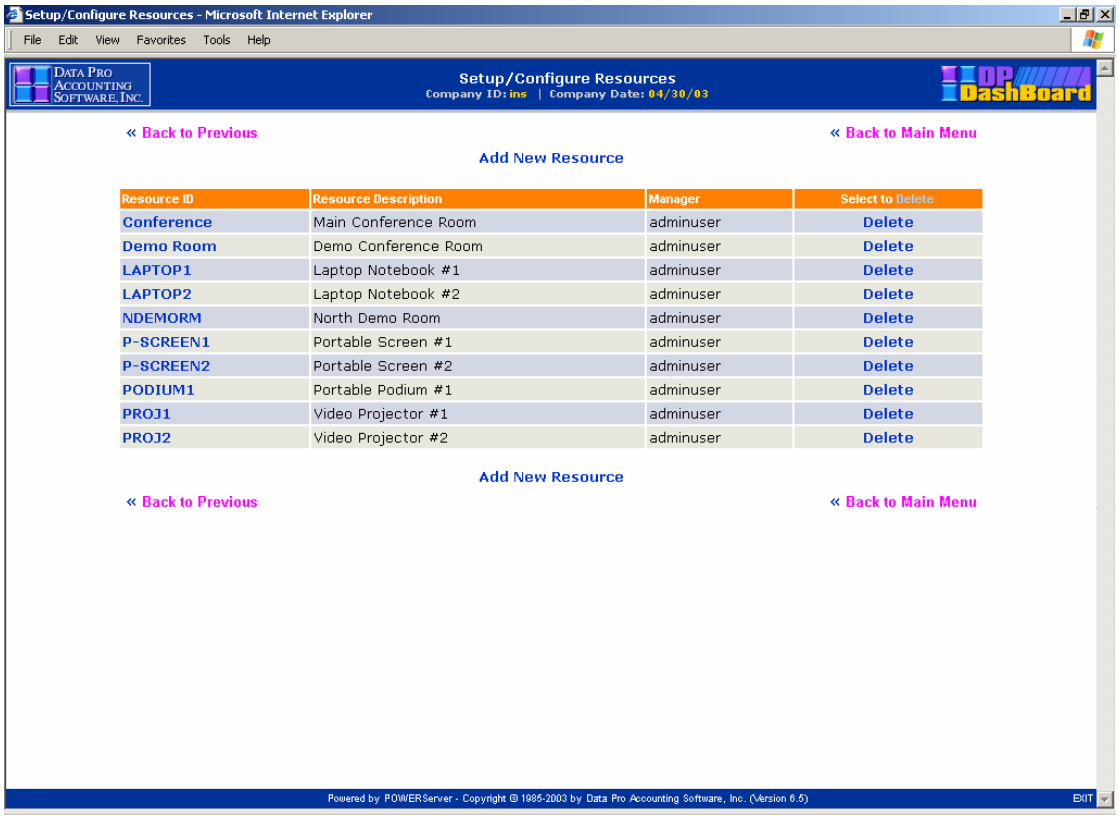


Figure 3-24. Setup/Configure Resources Screen

The following table describes the **Setup/Configure Resources** screen details:

Resource ID	Maximum of 11alpha/numeric characters. Abbreviation of the resource (e.g. Proj1 for Projector 1).
Resource Description	Maximum of 28 alpha/numeric characters. Name of the resource.
Manager	Name of user (with manager permissions) assigned to keep track of the resource.
Select to Delete	Selecting a component in this column deletes the associated resource from the **DP/DashBoard** system database.

To Add a Resource:

This option allows you to add resources to the **DP/DashBoard** system database. Resources added are available in the Events Calendar function when scheduling meetings, etc.

1. From the Setup/Configure Resources screen (Figure 3-24), <click> the **Add New Resource** option. The Add New Resource screen displays (Figure 3-25).

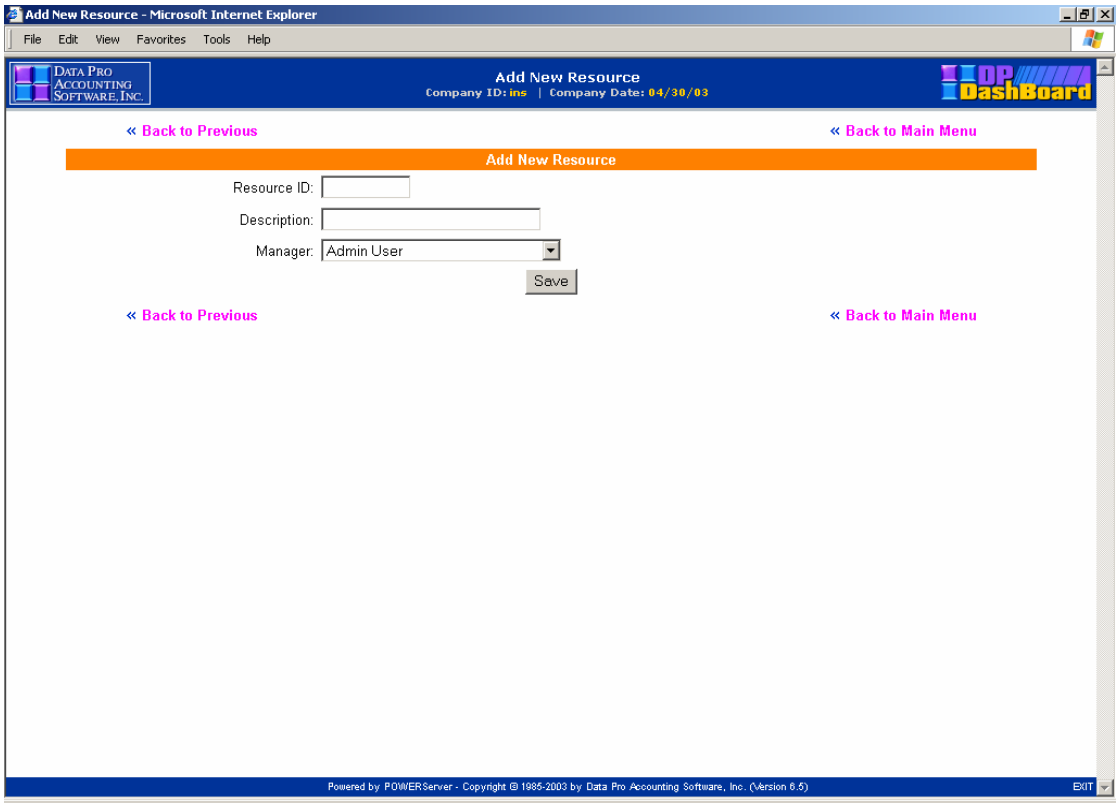


Figure 3-25. Add New Resource Screen

The following table describes the **Add New Resource** screen details:

Resource ID	Maximum of 11alpha/numeric characters. Abbreviation of the resource (e.g. Proj1 for Projector 1).
Description	Maximum of 28 alpha/numeric characters. Name of the resource.
Manager	Name of user (with manager permissions) assigned to keep track of the resource.

2. Enter the new resource identification in the **Resource ID** text box.
3. Enter a description of the resource in the **Description** text box.
4. <Click> the **Save** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Resources screen (Figure 3-24) where the new resource is now listed.

To Modify a Resource:

This option allows you to make changes to an existing resource.

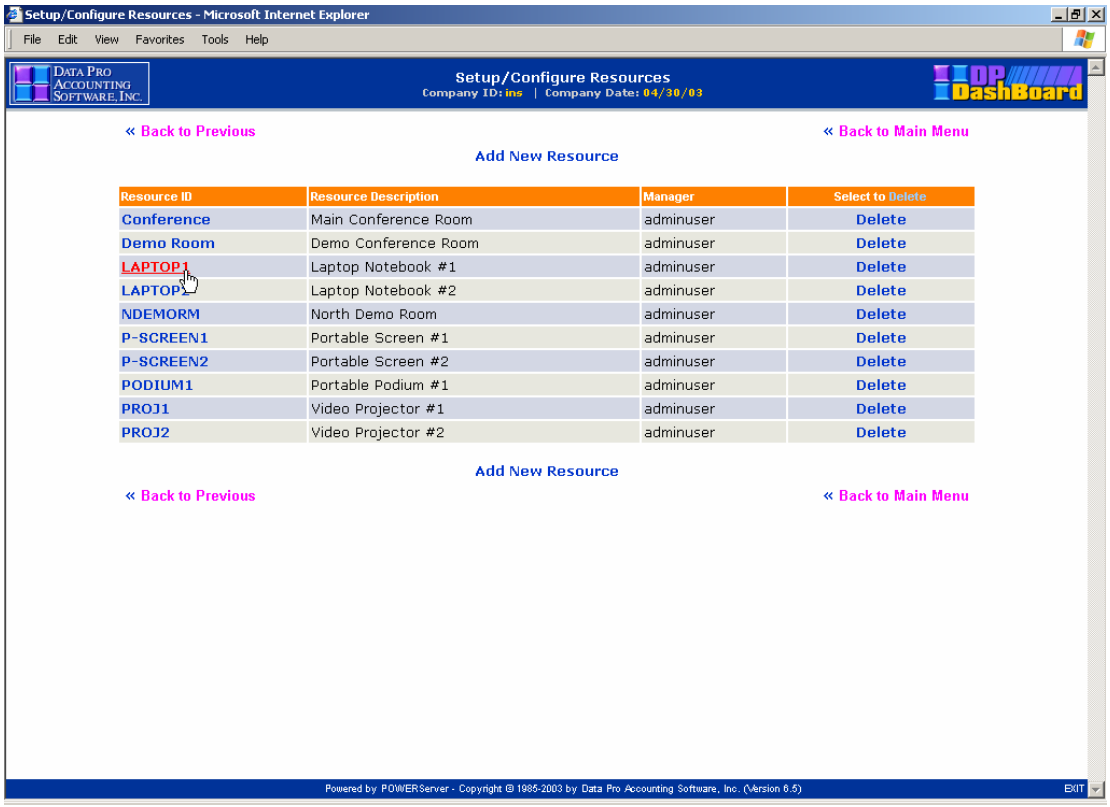


Figure 3-26. Setup/Configure Resources Screen – Modify Function

1. From the Setup/Configure Resources screen, <click> the user in the **User ID** column (Figure 3-26) to be modified. The Changing Resource screen displays (Figure 3-27).

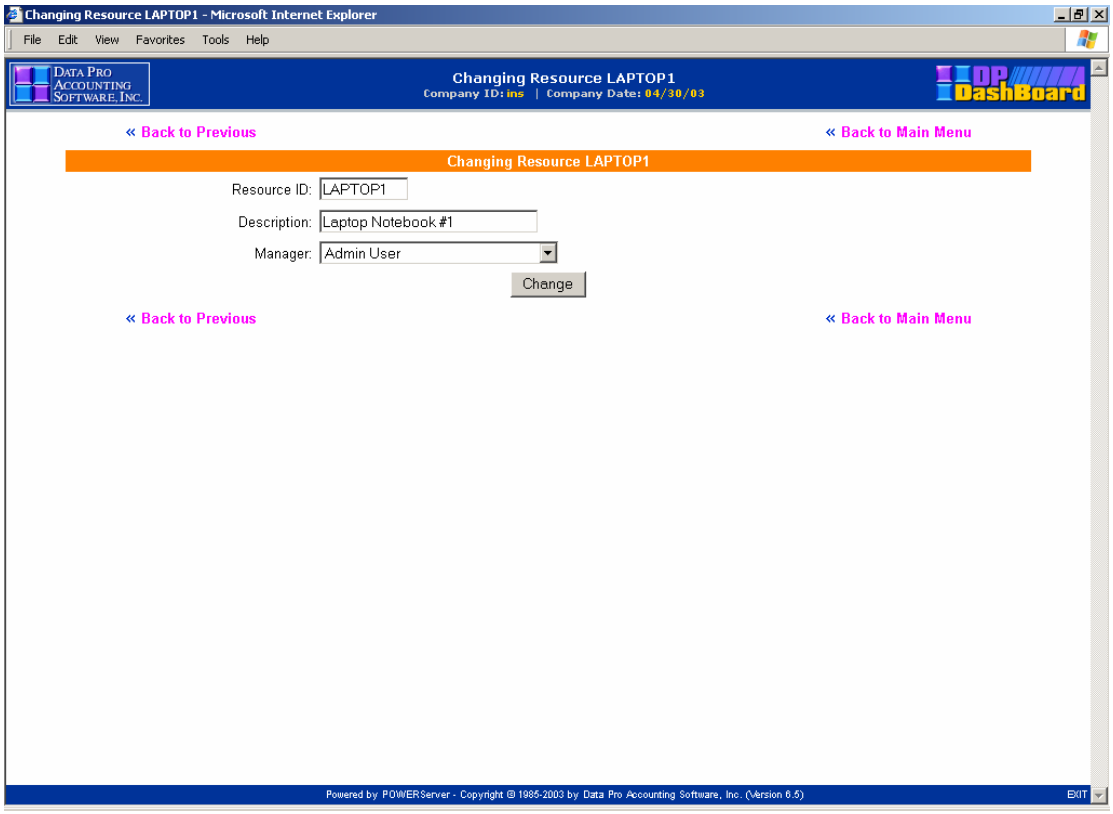


Figure 3-27. Changing Resource Screen

2. Make desired changes to the resource identification in the **Resource ID** text box.
3. Make desired changes to the resource identification in the **Description** text box.
4. <Click> the **Change** button. A message displays confirming the database record has been updated. The window closes and returns to the Setup/Configure Resources screen (Figure 3-24) where the changes are now listed.

To Delete a Resource:

This option allows you to remove a resource from the **DP/DashBoard** system database. Once a resource is deleted from the system, it is no longer available in the Calendar, Project Management, or other functions associated with resources within the program.

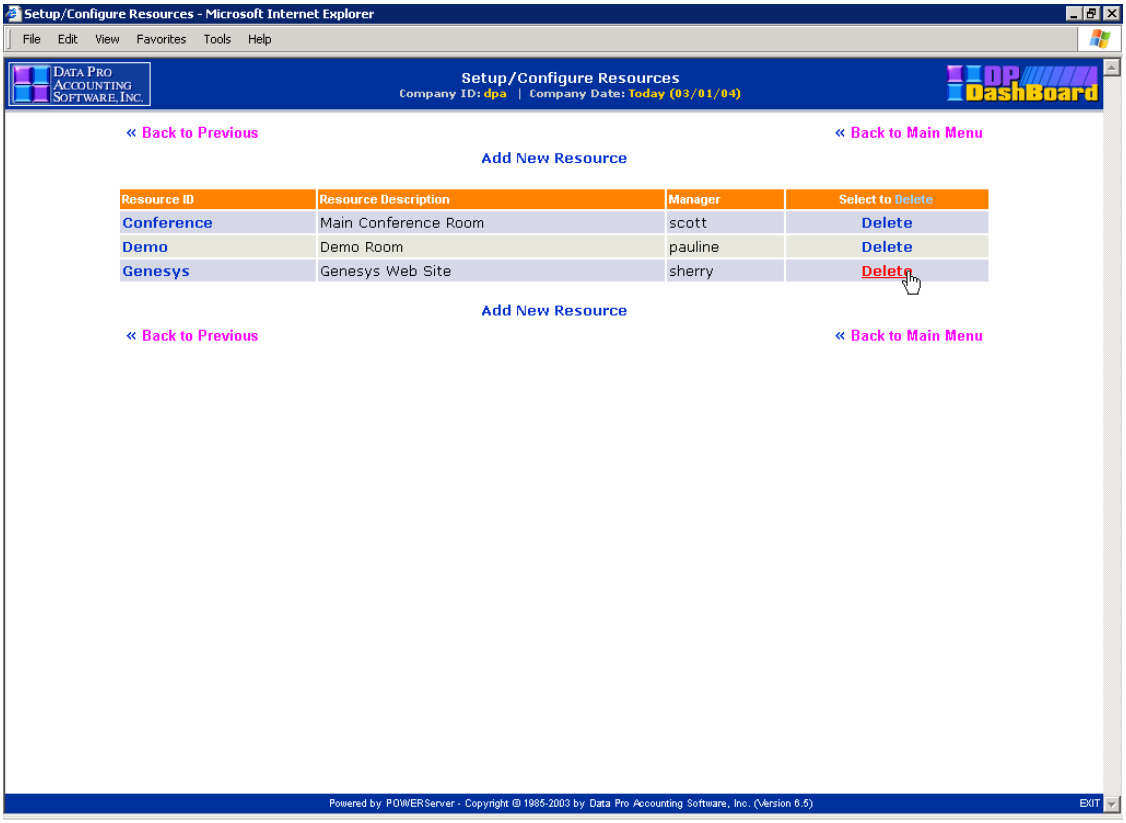


Figure 3-28. Setup/Configure Resources Screen – Delete Function

1. From the Setup/Configure Resources screen, <click> **Delete** from the Select to Delete column (Figure 3-28) for the desired resource to be deleted. A dialog box displays requesting confirmation to delete the selected resource.
2. <Click> the **OK** button in the dialog box to complete the delete function. The dialog box closes and returns to the Setup/Configure Resources screen (Figure 3-24) where the resource is now deleted.

Setup Maps & Directions

The Setup Maps & Directions option is designed to allow you to add, remove, and view a variety of maps and lists that are displayed in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen.

The following screen illustrates the section in the upper right-hand corner of the screen where these options are found once items have been added.

Figure 3-29. Maps & Lists Section>Maps & Directions

To Access the Setup Maps & Directions Screen:

1. From the **DP/DashBoard** Administration Menu screen (Figure 3-9), select the **Setup Maps & Directions** menu option. The Setup Maps & Directions screen (Figure 3-30) displays.

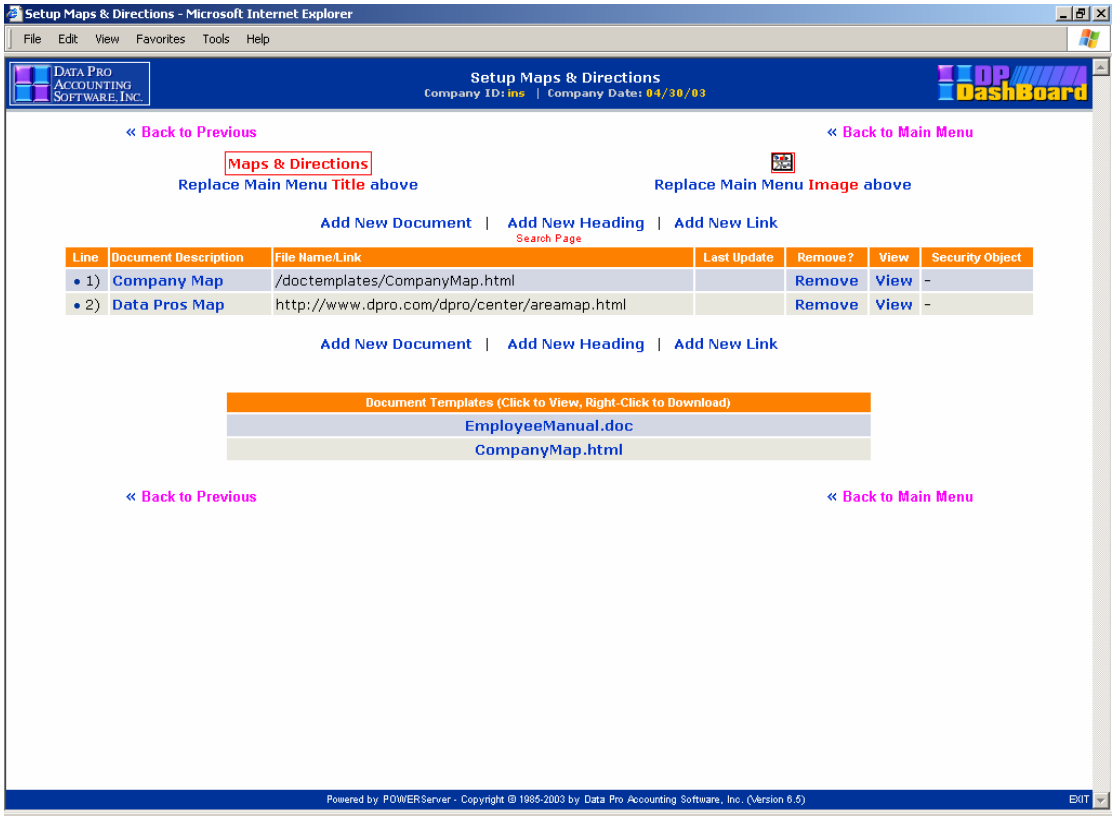


Figure 3-30. Setup Maps & Directions Screen

As documents are added, they are displayed in a consecutively numbered list including the following document details:

Line	Line number. System generated and automatically increments to the next highest number as documents /links are added. You can <click> on a bullet and drag/drop within the column to rearrange the order items appear in the list.
Document Description	Hyperlink. Description of document/link that you enter when you select the Add New Document or Add New Link option. Clicking on an item in this column will open the Changing Maps & Lists Document/Link window for the line item you selected. This window allows you to modify the description, source file, and security information for that document. This description also displays in the Maps & Directions screen in the **DP/DashBoard Menu System** screen (see the To Modify a Document/Heading/Link section).
File Name/Link	Name of file/link of new document. System generated based on the document file selected or path to the link provided when you select the Add New Document or Add New Link option in the Setup Maps & Directions screen.
Last Update	Date of most recent update to the file/link added. This column is automatically updated as files/links are revised.
Remove?	Hyperlink. Allows you to delete a document from the Maps & Directions screen on the **DP/DashBoard Menu System** screen (see the To Remove a Document/Heading/Link section).
View	Hyperlink. Opens the selected document for viewing while in Setup Mode (i.e. Preview). Headings added to the list of documents in the Setup Maps & Directions screen are labeled as such in the View Column.
Security Object	System generated. Displays the security permissions allocated to that particular document that were set up when the **Add New Document** or **Add New Link** option was selected. If security permissions are modified, this column will be automatically updated. See the **Security Objects Definitions** section of your ***System Administrator User Manual*** for a listing of security objects and their definitions.

To Replace the Maps & Directions Main Menu Image Icon:

This option allows you to replace the existing image icon for this document category that is displayed in the **DP/DashBoard Menu System** screen. Perform the following steps to select a new image icon.

NOTE

Remember, you may need to work with your graphics program to correctly size the icon image to fit correctly on the **DP/DashBoard** screen.

Figure 3-31. Maps & Directions Image Icon

1. From the Setup Maps & Directions screen (Figure 3-30), <click> the **Replace Main Menu Image above** option to select a new image icon. The Uploading the Image File in the Maps Category screen (Figure 3-32) displays.

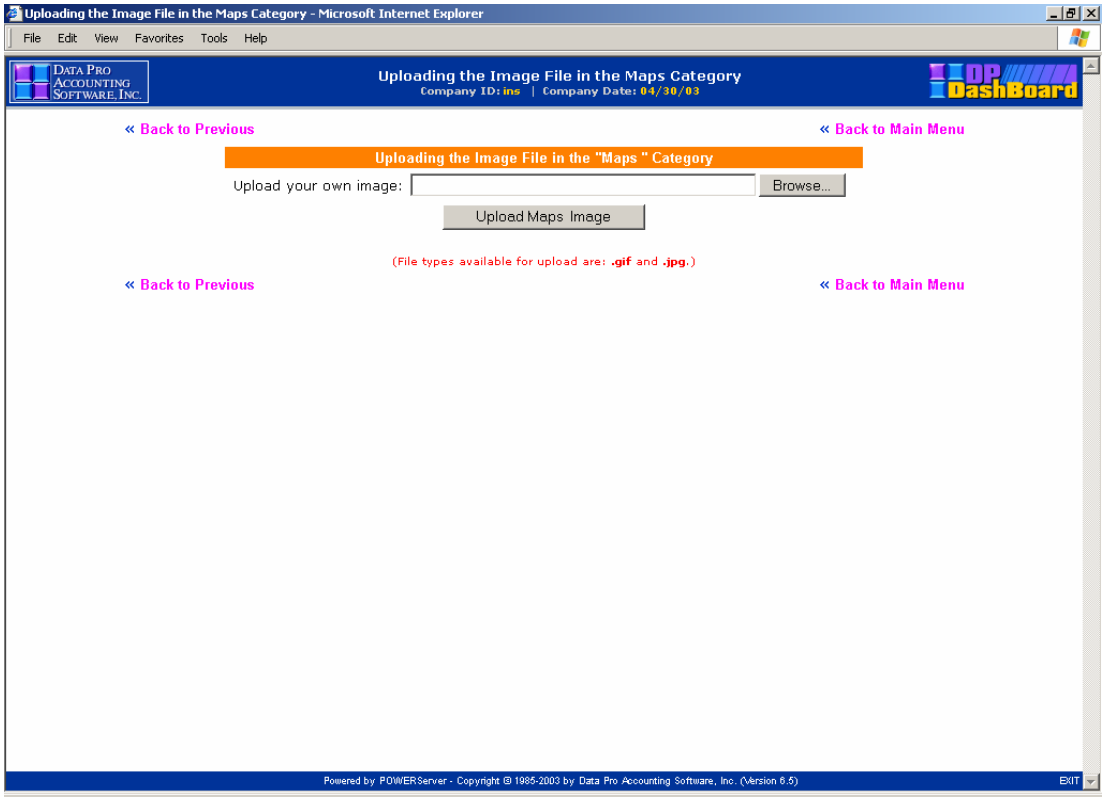


Figure 3-32. Uploading the Image File in the Maps Category Screen

2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Browse** button to select a path from your network. The Choose File window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

NOTE

Images must be in *.jpg* or *.gif* format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The Choose File window closes and the selected path and file name are now displayed in the Upload your own image text box.
6. <Click> the **Upload Maps Image** button. The Uploading File screen displays.
7. <Click> the **Return to Main Menu** option. The Upload Image Screen closes. The new image is updated in the Setup Maps & Directions screen and in the Maps & Lists>Maps & Directions section of the DP/DashBoard Menu System screen.

To Replace the Maps & Directions Main Menu Title:

This option allows you to rename the Main Menu title as it appears in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen (Figure 3-29). Perform the following steps to rename the main menu title.

NOTE

Changing the main menu title will automatically update every screen/menu option that this name reflects.

1. From the Setup Maps & Directions screen (Figure 3-30), <click> the **Replace Main Menu Title Above** option to change the title as it displays in the Maps & Lists section of the DP/DashBoard Menu System screen. The Changing Maps & Directions Main Menu Title screen (Figure 3-33) displays.

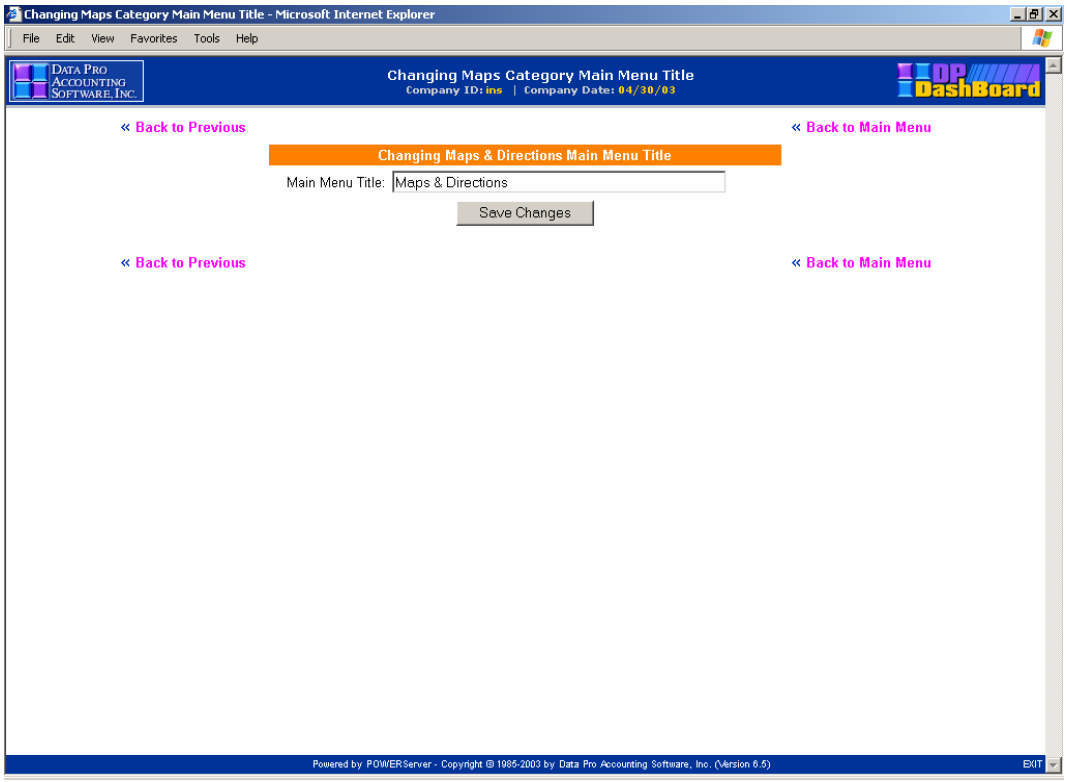


Figure 3-33. Changing Maps & Directions Main Menu Title Screen

2. Highlight the existing title in the **Main Menu Title** text box and <enter> the desired new title.
3. <Click> the **Save Changes** button. The new title now displays on the Setup Maps & Directions screen and also in the Maps & Lists section of the DP/DashBoard Menu System screen.

To Add a New Maps & Directions Document:

This option allows you to add a new document in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen. Perform the following steps to add a new document.

1. From the Setup Maps & Direction screen (Figure 3-30), <click> the **Add New Document** option. The Adding New Maps Documents Document screen (Figure 3-34) displays.

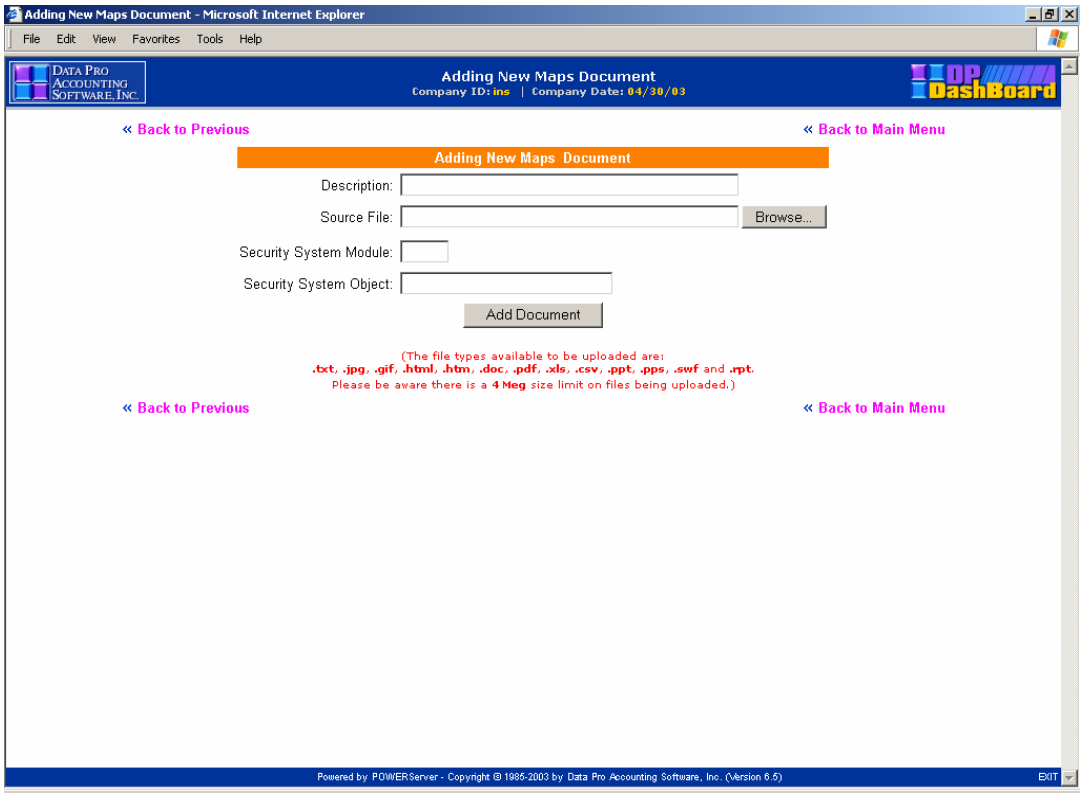


Figure 3-34. Adding New Maps Documents Document Screen

2. <Enter> a description of the document in the **Description** text box.
3. In the **Source File** section, <click> the **Browse** button. The Choose file window displays.
4. Select the appropriate folder from the **Look in** pull-down menu from the Choose file window.
5. Select the desired file or type in the exact filename of the document in the **File name** text box.

NOTE

The file types available to be uploaded are *.txt*, *.jpg*, *.gif*, *.html*, *.doc*, *.pdf*, *.xls*, *.csv*, *.ppt*, *.pps*, *.swf* and *.rpt*. Files cannot exceed 4 mb for upload.

6. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.). If you want everyone to have access to this document, then leave this option blank. See the ***Security Objects Definitions Reference Manual*** found in your ***System Administrator User Manual*** for a listing of security objects by module and their definitions.

NOTE

If certain documents are sensitive like certain accounting functions, then grant similar security rights from the accounting system's Advanced Security Administrator module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects.

Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.).

7. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. See the ***Security Objects Definitions Reference Manual*** found in your ***System Administrator User Manual*** for a listing of security objects by module and their definitions.

8. <Click> the **Add Document** button. The Adding New Maps Documents Document screen closes and the new document now displays in the Setup Maps & Directions screen and also in the Maps & Lists>Maps & Directions section of the **DP/DashBoard Menu System** screen.

To Add a New Maps & Directions Heading:

This option allows you to add a new heading in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen. This is really useful if you want to categorize documents within a group. Perform the following steps to add a new heading.

1. From the Setup Maps & Direction screen (Figure 3-30), <click> the **Add New Heading** option. The Adding New Maps Heading screen (Figure 3-35) displays.

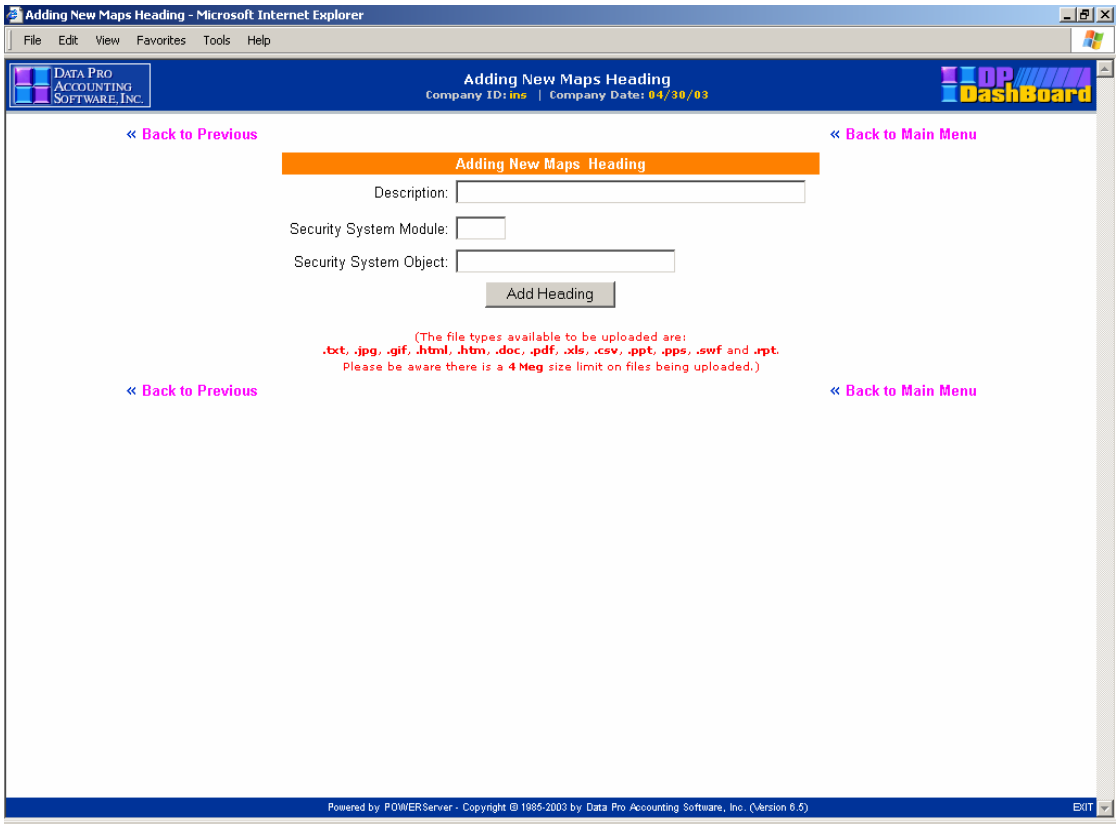


Figure 3-35. Adding New Maps Heading Screen

2. <Enter> the New Heading in the **Description** text box.
3. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.). If you want everyone to have access to this document, then leave this option blank. See Step 6, NOTE, in the To Add a New Maps & Directions Document section for further explanation.
4. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. See the ***Security Objects Definitions Reference Manual*** found in your ***System Administrator User Manual*** for a listing of security objects by module and their definitions.

5. <Click> the **Add Heading** button. A message displays confirming the document index has been updated.
6. <Click> the **Return to Menu** option. The Adding New Maps Heading screen closes and the new heading now displays as a list item in the Setup Maps & Directions screen as well as in the Maps & Lists>Maps & Directions section of the DP/DashBoard Menu System screen.

To Add a New Maps & Directions Link:

This option allows you to add a new link to a website in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen. Perform the following steps to add a new link.

1. From the Setup Maps & Directions screen (Figure 3-30), <click> the **Add New Link** option. The Adding New Maps Link screen (Figure 3-36) displays.

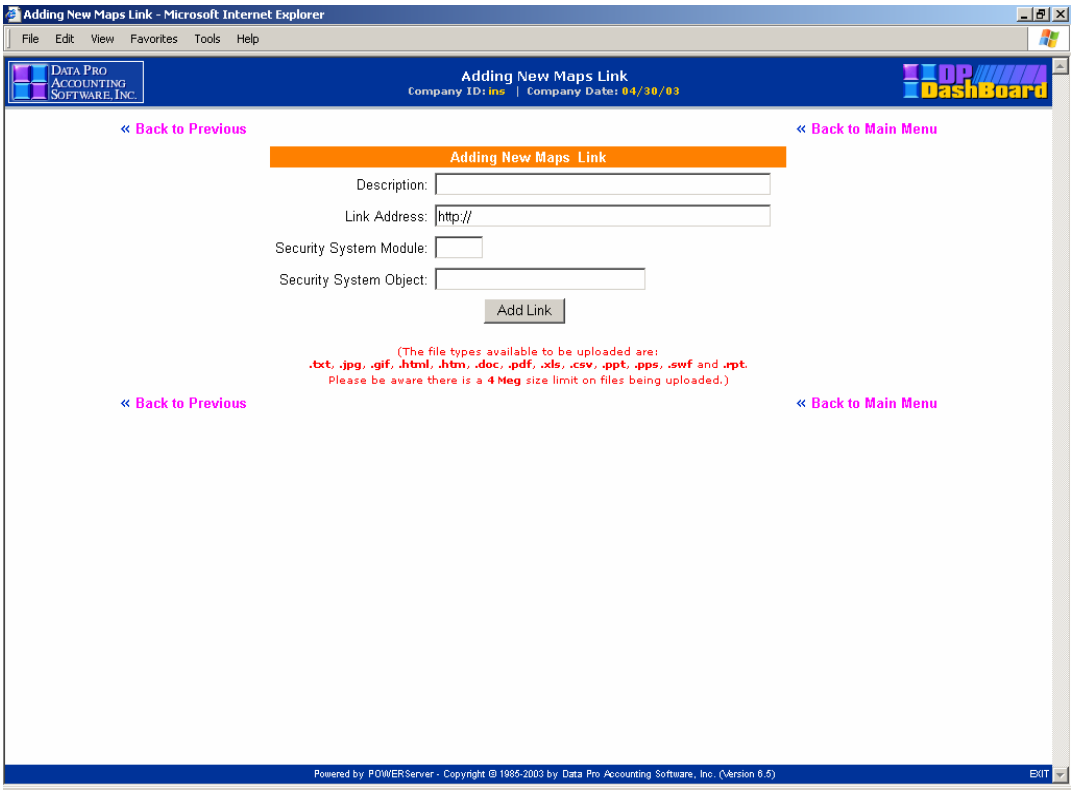


Figure 3-36. Adding New Maps Link Screen

2. <Enter> a description of the document in the **Description** text box.
3. <Enter> the path to the desired website in the **Link Address** text box.
4. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.). If you want everyone to have access to this document, then leave this option blank. See Step 6, NOTE, in the To Add a New Maps & Directions Document section for further explanation.
5. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. See the **Security Objects Definitions** section of your ***System Administrator User Manual*** for a listing of security objects by module and their definitions.

6. <Click> the **Add Link** button. The Adding New Maps Link screen (Figure 3-36) displays, confirming the document index has been updated. The window closes and returns to the Setup Maps & Directions screen. The new document link now displays in the list of maps and also in the Maps & Lists>Maps & Directions section of the **DP/DashBoard Menu System** screen.

To Modify a Maps & Directions Document/Heading/Link:

This option allows you to modify the properties set up for documents, headings, and links that have been added to the list of items in the Setup Maps & Directions screen (Figure 3-30) and accessible in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen.

The following table describes the associated properties that can be modified for each of the item types listed in the Setup Maps & Directions screen.

Item Type	Properties to Modify
Document	Description, Source File, Security System Module, Security System Object. The current file name is displayed as well as the date of last update.
Heading	Description, Security System Module, Security System Object
Link	Description, Link Address, Security System Module, Security System Object.

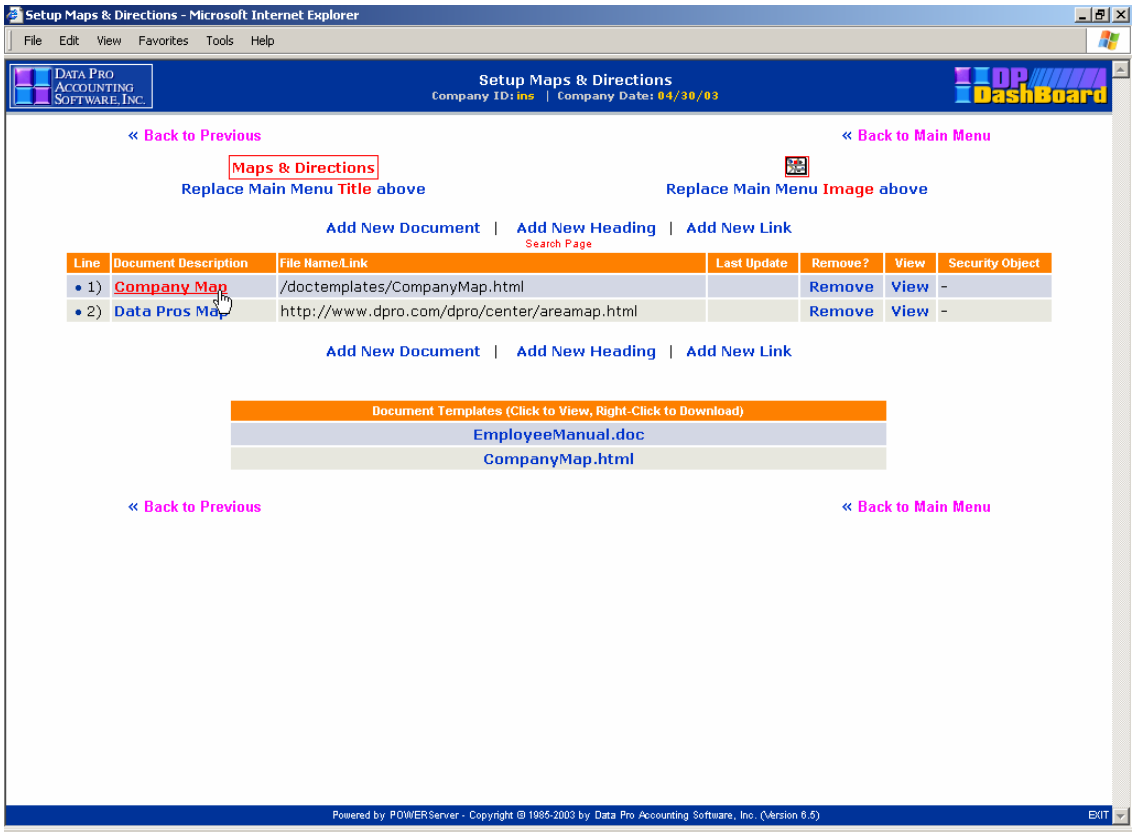


Figure 3-37. Setup Maps & Directions Screen – Modify Function

1. In the Setup Maps & Directions screen, <click> the list item to be modified in the **Document Description** column (Figure 3-37). The Changing Maps Document/Heading/Link screen (Figure 3-38) displays, indicating the line number of the item to be modified.

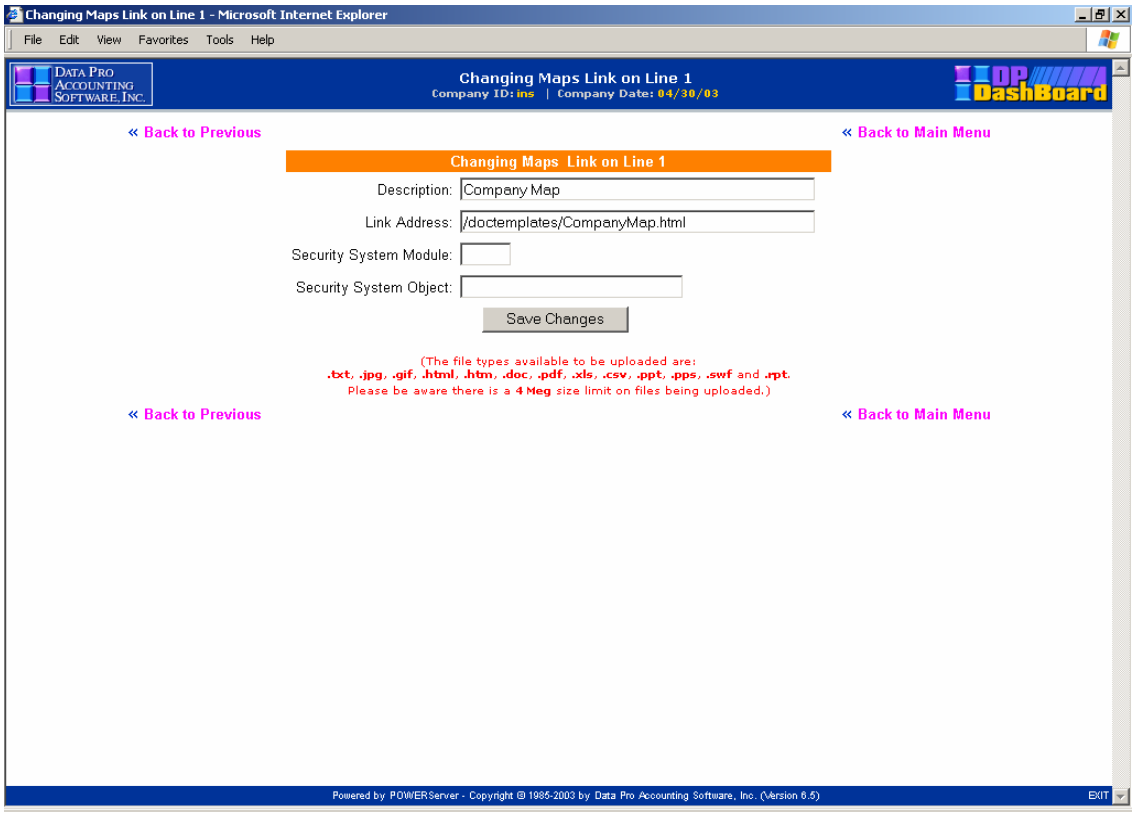


Figure 3-38. Changing Maps Document/Heading/Link Screen – Modify Function

2. Depending on the item selected, make the desired changes in the applicable modifiable options.
3. <Click> the **Save Changes** button. A message confirms the document index has been updated.
4. <Click> the **Return to Menu** option. The window closes and returns to the Setup Maps & Directions screen. The modifications are now updated in the document list in the Setup Maps screen and in the Maps & Lists>Maps & Directions section of the **DP/DashBoard Menu System** screen.

To Remove a Maps & Directions Document/Heading/Link:

This option allows you to delete documents, headings, and links that have been added to the list of items in the Setup Maps & Directions screen (Figure 3-30) and in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen.

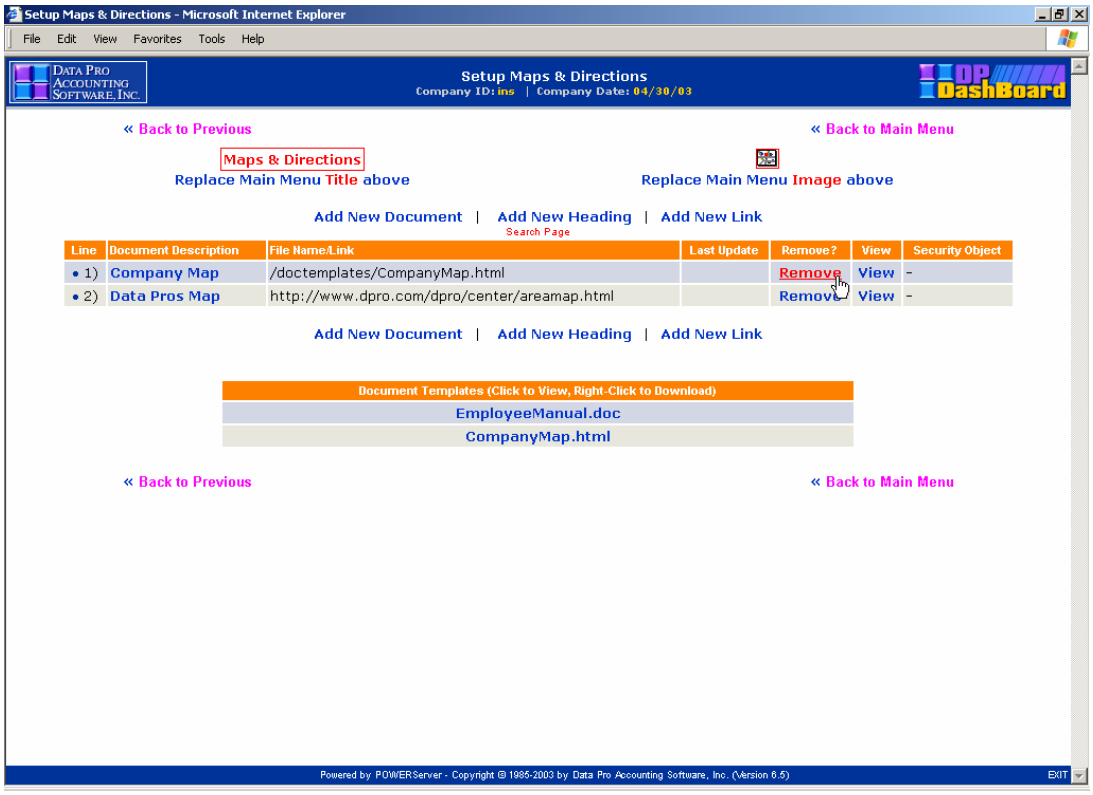


Figure 3-39. Setup Maps & Directions Screen – Remove Function

1. In the Setup Maps & Directions screen, <click> the **Remove** option from the Remove? column (Figure 3-39) for the item to be deleted. The Deleting Maps Document/Heading/Link screen (Figure 3-40) displays, indicating the line number of the item to be deleted.

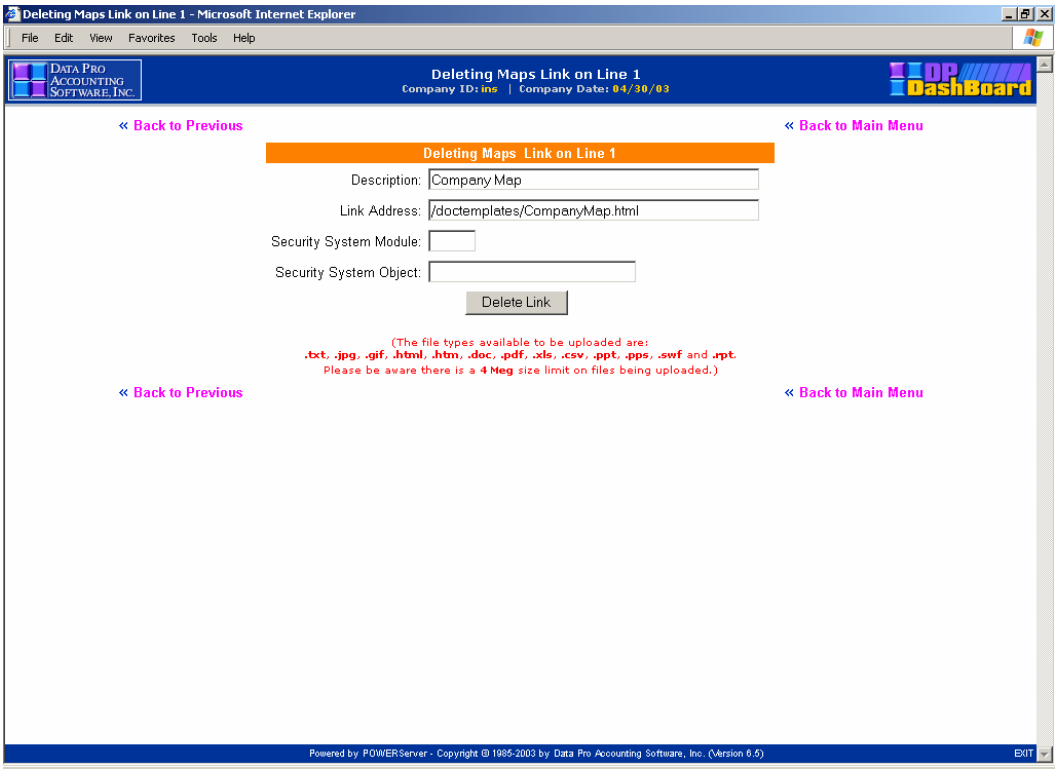


Figure 3-40. Deleting Maps Document/Heading/Link Screen – Remove Function

2. <Click> the **Delete Document/Heading/Link** button. A message confirms the document index has been updated.
3. <Click> the **Return to Menu** option. The window closes and returns to the Setup Maps & Directions screen. The selected item has been deleted from the document list in the Setup Maps & Directions screen and in the Maps & Lists>Maps & Directions section of the DP/DashBoard Menu System screen.

To View a Maps & Directions Document/Heading/Link:

This option allows you to view documents and links that have been added to the list of items in the Setup Maps & Directions screen and in the **Maps & Lists>Maps & Directions** section of the **DP/DashBoard Menu System** screen. Selecting the view function will automatically open the selected document or launch the website associated with the selected link.

NOTE

Headings can only be viewed by selecting the Maps & Lists>Maps & Directions menu option from the DP/DashBoard Menu System screen.

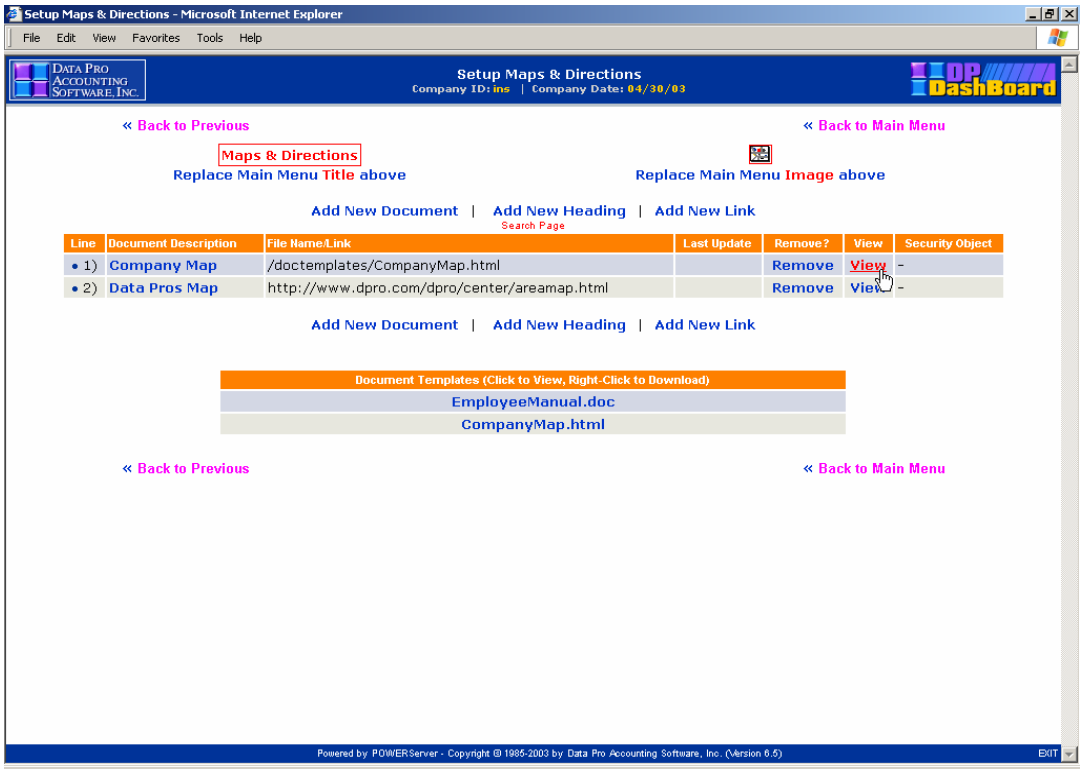


Figure 3-41. Setup Maps & Directions Screen – View Function

1. In the Setup Maps & Directions screen, <click> the **View** option from the **View** column (Figure 3-41) for the item to be opened. The document or website automatically opens for viewing. Closing the document or website returns you to the Setup Maps & Directions screen.

To Download a Maps & Directions Document:

1. From the Maps & Directions screen, <right-click> the desired document to download from the **Document Description** column and select the **Save Target As** option (Figure 3-42). The Save As window (Figure 3-43) displays.

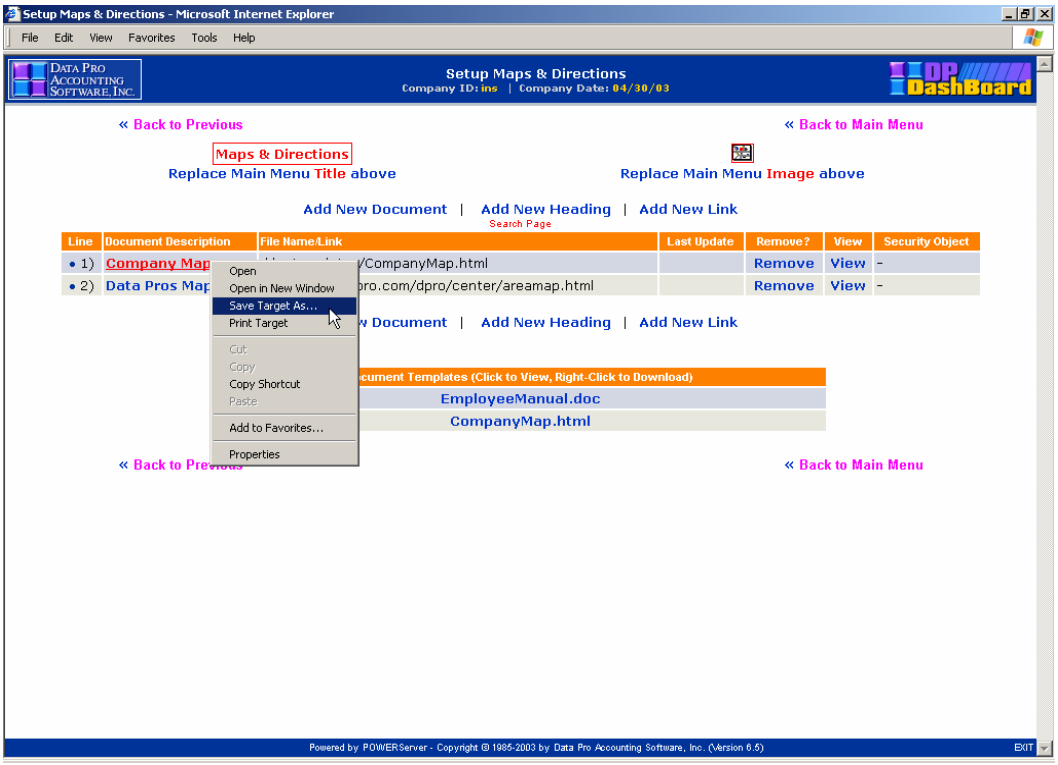


Figure 3-42. Setup Maps & Directions – Download Document Function

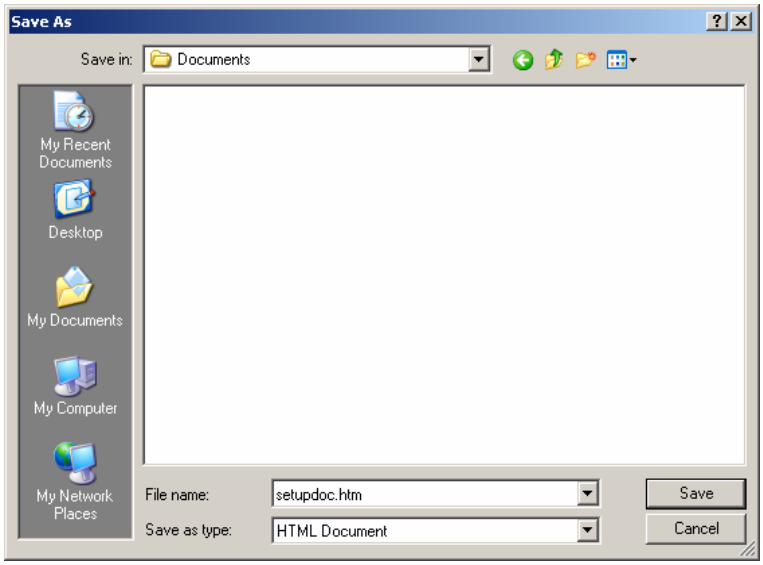


Figure 3-43. Save As Window

2. Select the desired directory to download the file into from the **Save In** pull-down menu.
3. If desired, rename the document in the **File Name** pull-down menu.
4. If appropriate, change the file type in the **Save as type** pull-down menu.

5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

Setup Company Logos and Phone Numbers

This configuration option allows you to add and modify your company address, contact information (phone and fax numbers), and Phone List image that are displayed in the **Maps & Lists>Internal Phone List** section of the **DP/DashBoard Menu System** screen. You can also change your company logo, which will globally update wherever the current logo displays throughout the system.

The following screen (Figure 3-44) illustrates the section in the upper right hand corner of the screen where these options are displayed.

Figure 3-44. DP/DashBoard Menu System>Logo and Phone Numbers

To Access the Setup Company Logo and Phone Numbers Screen:

1. From the **DP/DashBoard** Administration Menu screen (Figure 3-9), select the **Setup Company Logo and Phone Numbers** menu option. The Company Logo and Phone Number Configuration screen (Figure 3-45) displays.

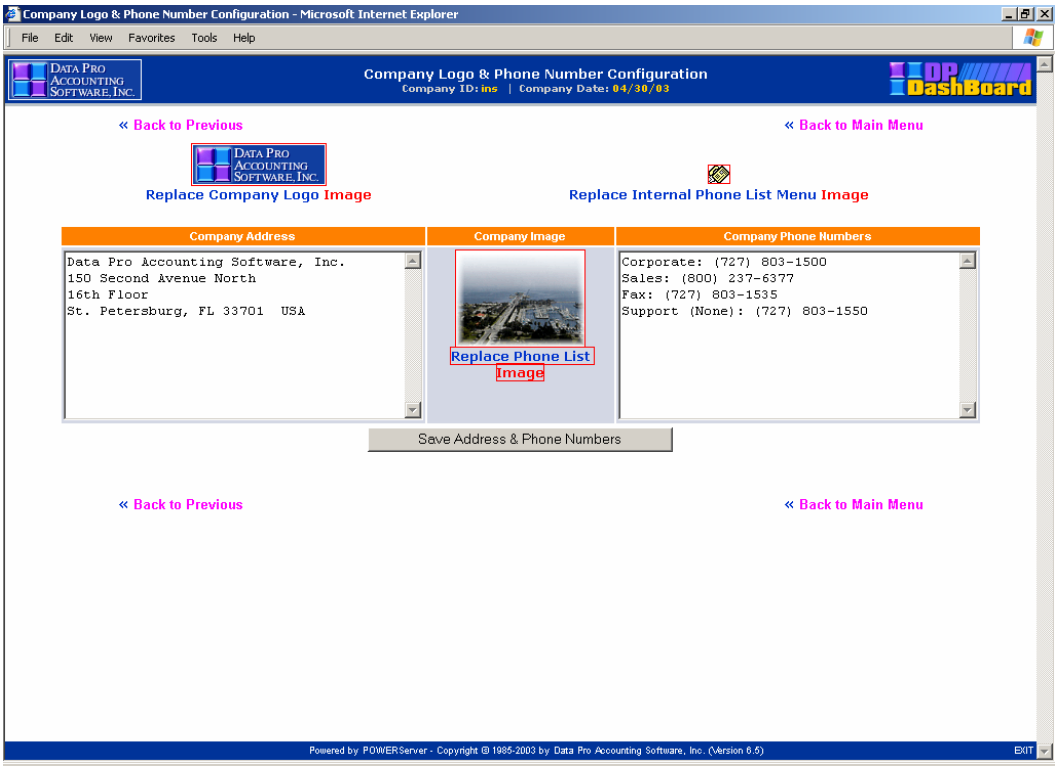


Figure 3-45. Company Logo and Phone Number Configuration Screen

To Replace the Company Logo Image:

This option allows you to replace the existing company logo that displays in the **DP/DashBoard** header throughout the program. Perform the following steps to replace your company logo.

1. From the Company Logo and Phone Numbers Configuration screen (Figure 3-45), <click> the **Replace Company Logo Image** option to select a new the image. The Uploading the Image File in the Company Logo Category screen (Figure 3-46) displays.

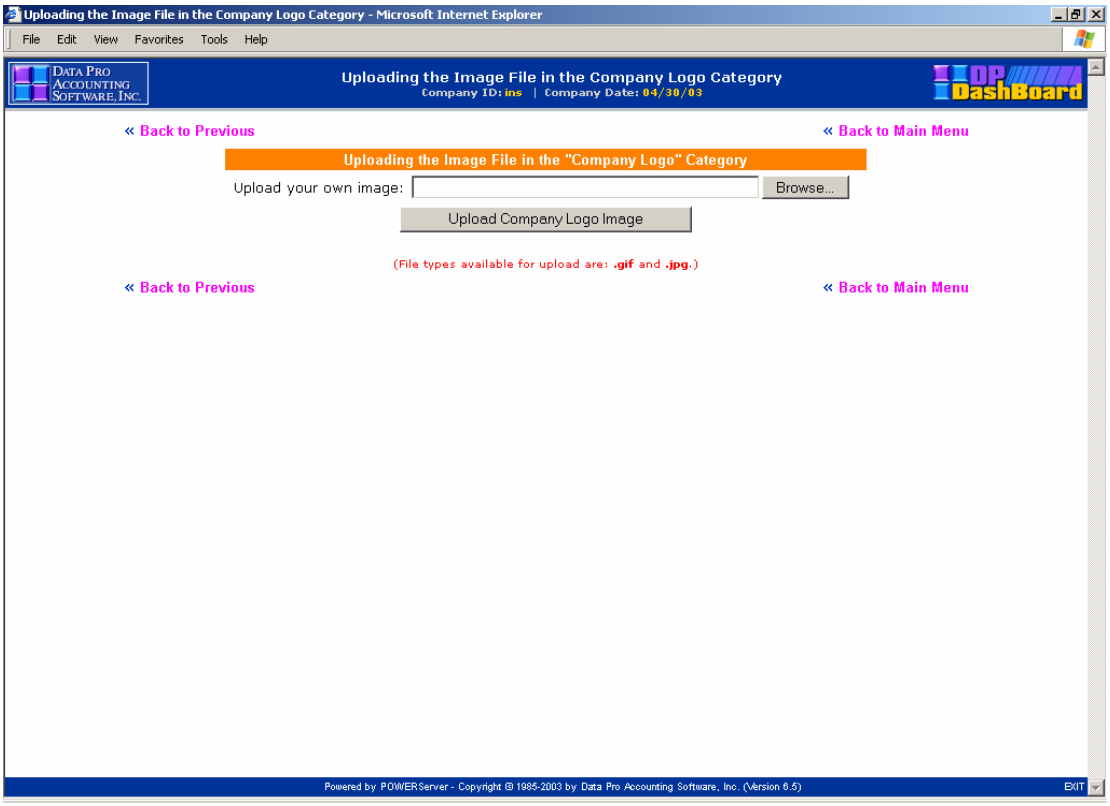


Figure 3-46. Upload the Image File in the Company Logo Category Screen

2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Browse** button to select a path from your network. The Choose File window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

NOTE

Images must be in *.jpg* or *.gif* format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The Choose File window closes and the selected path and file name are now displayed in the Upload your own image text box.
6. <Click> the **Upload Company Logo Image** button. The Upload Image Screen displays confirming the file was uploaded successfully.
7. <Click> the **Return to Main Menu** option. The Upload Image Screen closes. The new image is updated in the Company Logo and Phone Number Configuration screen and in the **DP/DashBoard Menu System** screen header that displays throughout the program.

To Replace the Internal Phone List Menu Image Icon:

This option allows you to replace the existing internal phone list image icon that displays in the **Maps and List>Internal Phone List** section (Figure 3-47) of the **DP/DashBoard Menu System** screen. Perform the following steps to replace the internal phone list image icon.

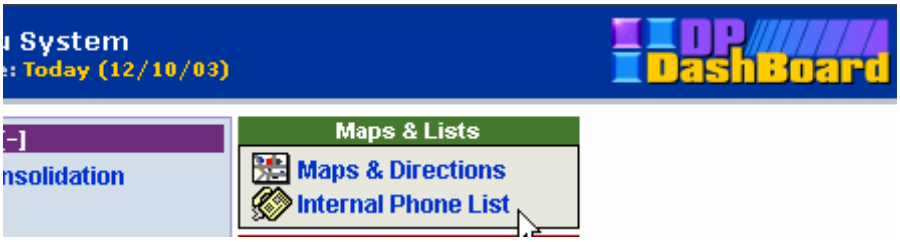


Figure 3-47. Internal Phone List Menu Option Image Icon

1. From the Company Logo and Phone Numbers Configuration screen, <click> the **Replace Company Logo Image** option to select a new image icon. The Uploading the Image File in the Company Logo Category screen (Figure 3-48) displays.

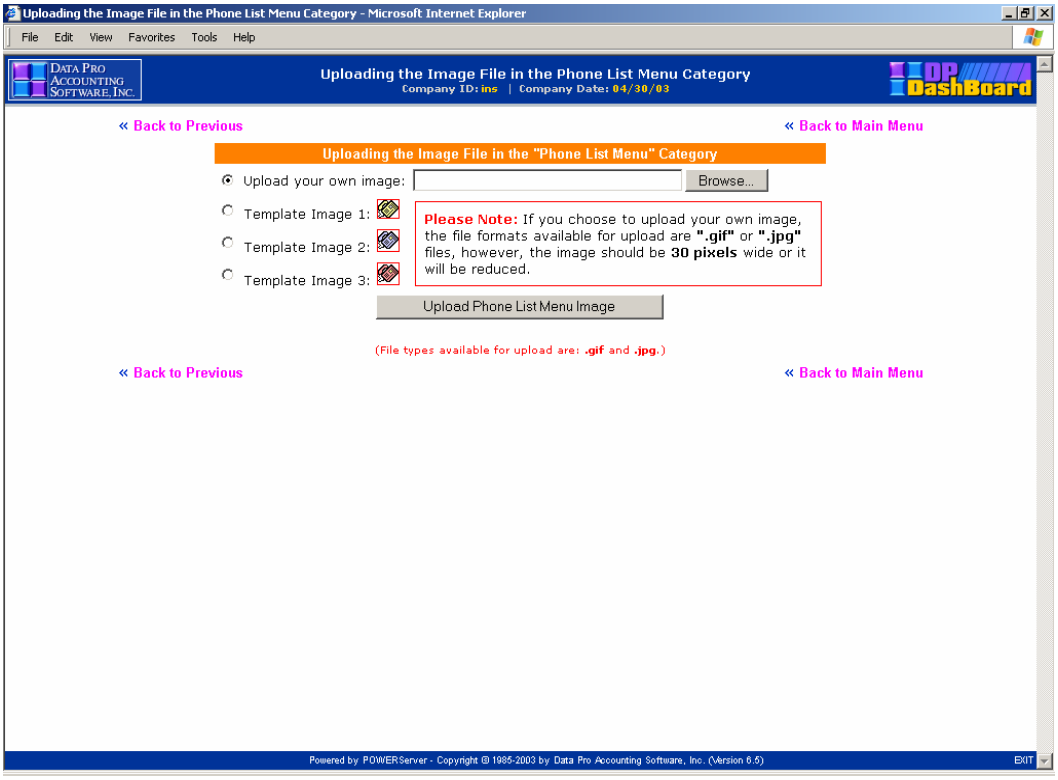


Figure 3-48. Uploading the Image file in the Phone List Menu Category Screen

2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Browse** button to select a path from your network. The Choose File window displays.

3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

NOTE

Images must be in *.jpg* or *.gif* format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The Choose File window closes and the selected path and file name are now displayed in the Upload your own image text box.

OR

6. <Click> the appropriate radio button to select one of the available **Template Images**.

Figure 3-49. Phone List - Template Images

7. <Click> the **Upload Phone List Menu Image** button. The Uploading File screen displays confirming the image was uploaded successfully.
8. <Click> the **Return to Main Menu** option. The Uploading File screen closes. The new image is updated in the Maps & Lists>Internal Phone List section of the DP/DashBoard Menu System screen.

To Replace the Phone List Image:

This option allows you to replace the existing phone list image that displays in the **Maps and List>Internal Phone List** section (Figure 3-47) of the **DP/DashBoard Menu System** screen. Perform the following steps to replace the internal phone list image:

1. From the Company Logo and Phone Numbers Configuration screen, <click> the **Replace Company Logo Image** option to select a new image icon. The Uploading the Image File in the Phone List Category screen displays (Figure 3-50).

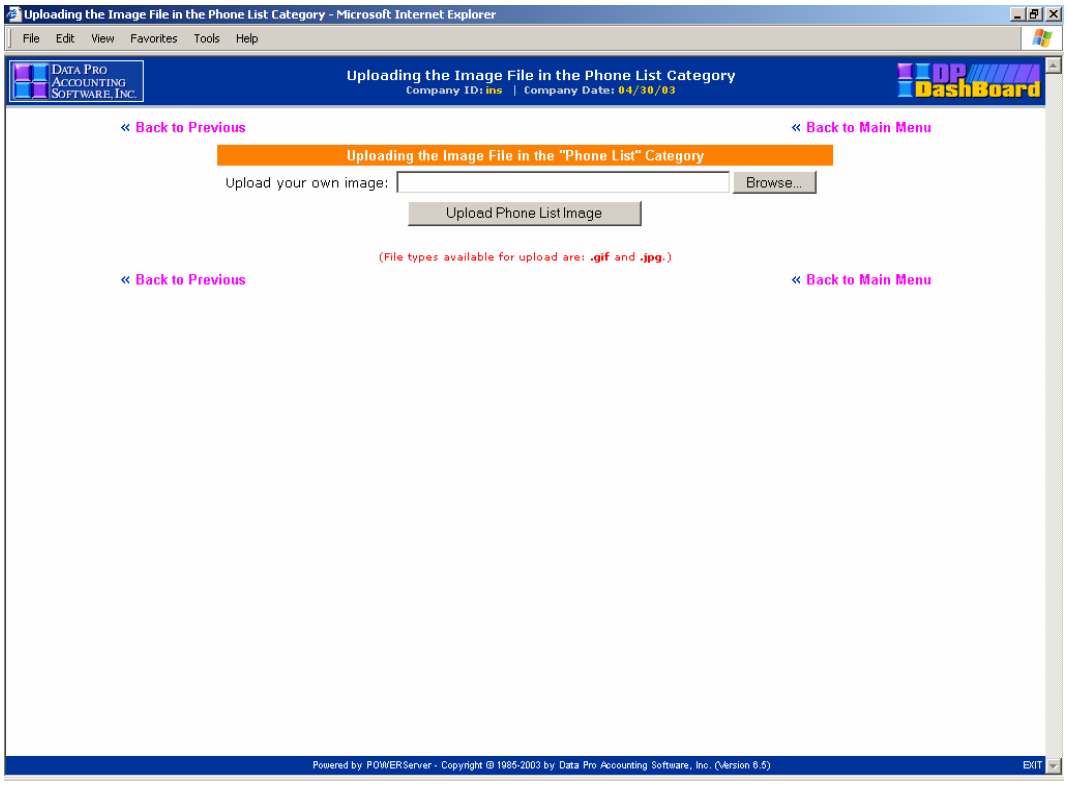


Figure 3-50. Uploading the Image File in the Phone List Category

2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Browse** button to select a path from your network. The Choose File window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or type in the exact filename of the image in the **File name** text box.

NOTE

Images must be in *.jpg* or *.gif* format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The Choose File window closes and the selected path and file name are now displayed in the Upload your own image text box.
6. <Click> the **Upload Phone List Image** button. The Uploading File screen displays confirming the image was uploaded successfully.
7. <Click> the **Return to Main Menu** option. The Uploading File screen closes. The new image is updated in the Maps & Lists>Internal Phone List section of the DP/DashBoard Menu System screen.

To Add/Modify Company Address and Phone Numbers:

This option allows you to add/modify your company's address (physical and/or mailing address) and contact information such as corporate, department, and support phone numbers as well as fax numbers. This company information displays at the top of the Internal Phone List screen when accessed from the **Maps & List>Internal Phone List** section (Figure 3-47) of the **DP/DashBoard Menu System** screen. Perform the following steps to add/modify a company address and contact information.

1. From the Company Logo and Phone Numbers Configuration Screen, <enter> the desired address in the **Company Address** text window (Figure 3-51).
2. Enter the desired address in the **Company Address** text box.

Figure 3-51. Company Address/Company Phone Numbers Text Windows

3. Enter the desired contact information in the **Company Phone Numbers** text box.
4. <Click> the **Save Address and Phone Numbers** button. The Updating Company Address and Phone Numbers screen displays, confirming the new information has been updated. The screen closes and returns to the Company Logo and Phone Numbers Configuration screen.

Setup Available Companies

This configuration option allows you to assign a unique company identifier, usually an abbreviation of a company name. The Company ID is displayed in the **DP/DashBoard** main header to indicate the active company. Adding a new company affects Reports/Drilldown, Customer Support, and Custom Applications from the **DP/DashBoard** Menu System screen.

To Access the Setup Available Companies Screen

1. From the DP/DashBoard Administration Menu screen (Figure 3-31), select the **Setup Available Companies** menu option. The Company Configuration screen (Figure 3-52) displays.

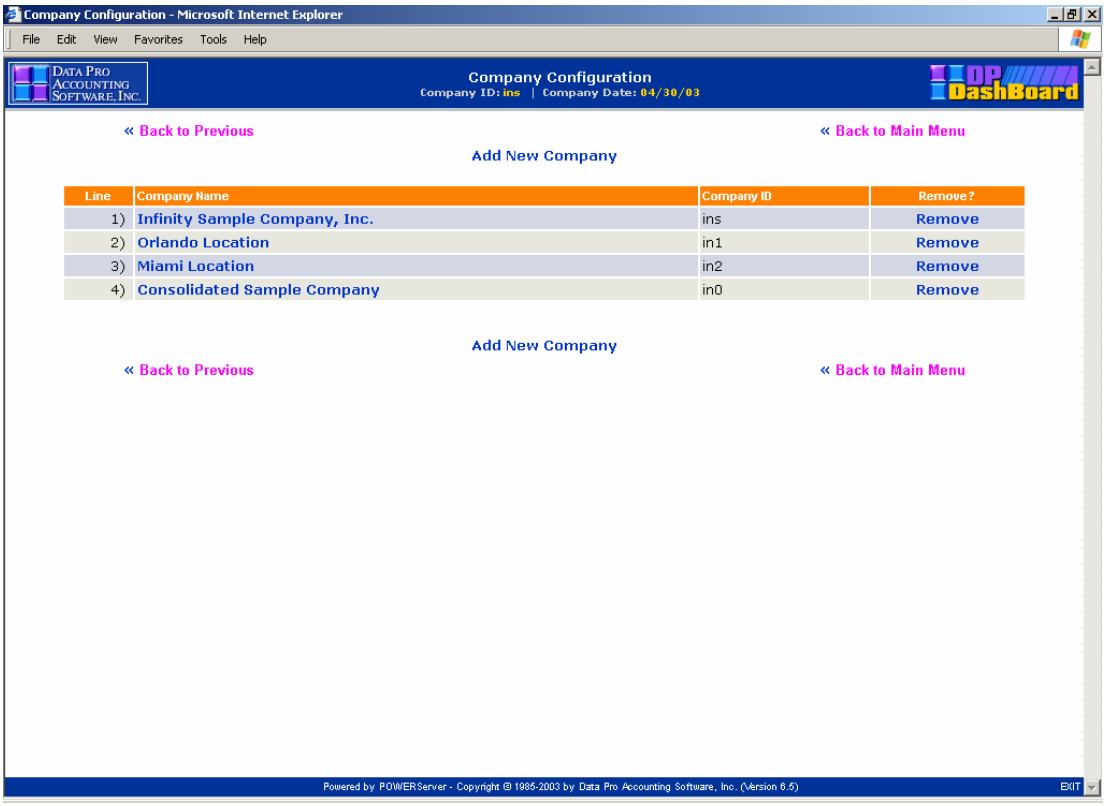


Figure 3-52. Company Configuration Screen

As companies are added, they are displayed in a consecutively numbered list including the following document details:

Line	Line number. System generated and automatically increments to the next highest number as companies are added.
Company Name	An alpha/numeric text string that consists of 40 characters that describe the company name. System generated for this screen based on the user-defined company name in the Company Configuration Screen>Add New Company option.
Company ID	An alpha/numeric text string that consists of (3) three characters that identifies the company. You cannot use one or two characters only. System generated for this screen based on the user-defined company ID in the Company Configuration Screen>Add New Company option.
Remove?	Hyperlink. Allows you to delete a company from the **DP/DashBoard** database. This option allows you to delete companies once they have been added to the list of companies in the Company Configuration screen. Removing a company will affect all functions throughout the **DP/DashBoard** system where selecting a company is possible.

To Add a Company:

This Configuration option allows you to add a new company to the **DP/DashBoard** Database. Once a company is added, it will become available for selection for the following Main Menu functions: Reports/Drilldown, Customer Support, and Custom Applications.

1. From the Company Configuration screen (Figure 3-52), <click> the **Add New Company** option to set up a new company. The Adding New Company screen displays (Figure 3-53).

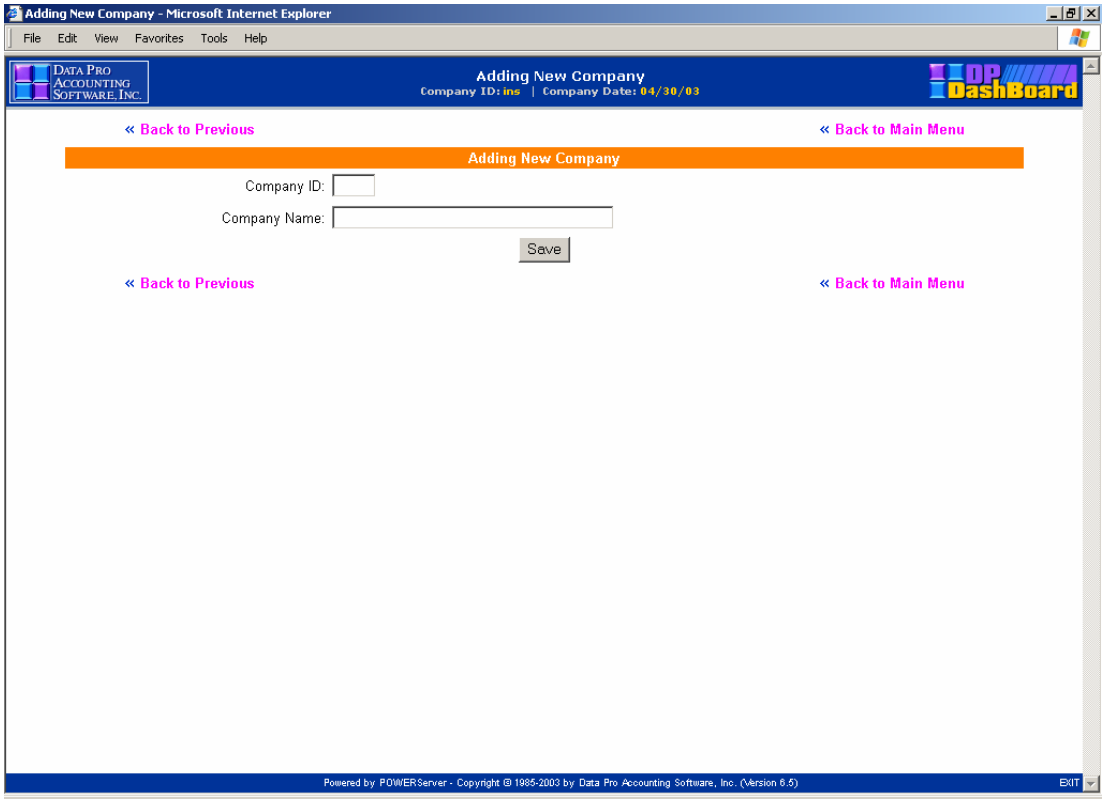


Figure 3-53. Adding New Company Screen

2. Enter the user defined company identification in the **Company ID** text box. The Company ID is an alpha/numeric text string that consists of three characters. You cannot use one or two characters only.

> **NOTE**
>
> Consider making the Company ID an abbreviation of the actual company name so that it will be easily recognized. It must be a valid company that exists with the **Infinity POWER** programs already.

3. Enter the company name in the **Company Name** text box.
4. <Click> the **Save** button. A message displays confirming the company index has been updated. The window closes and returns to the Company Configuration Screen. The new company name and company ID displays in the Add New Company list.

To Modify a Company:

This option allows you to modify the properties set up for companies once they have been added to the list of items in the Company Configuration screen accessed when you select the Setup Available Companies configuration option.

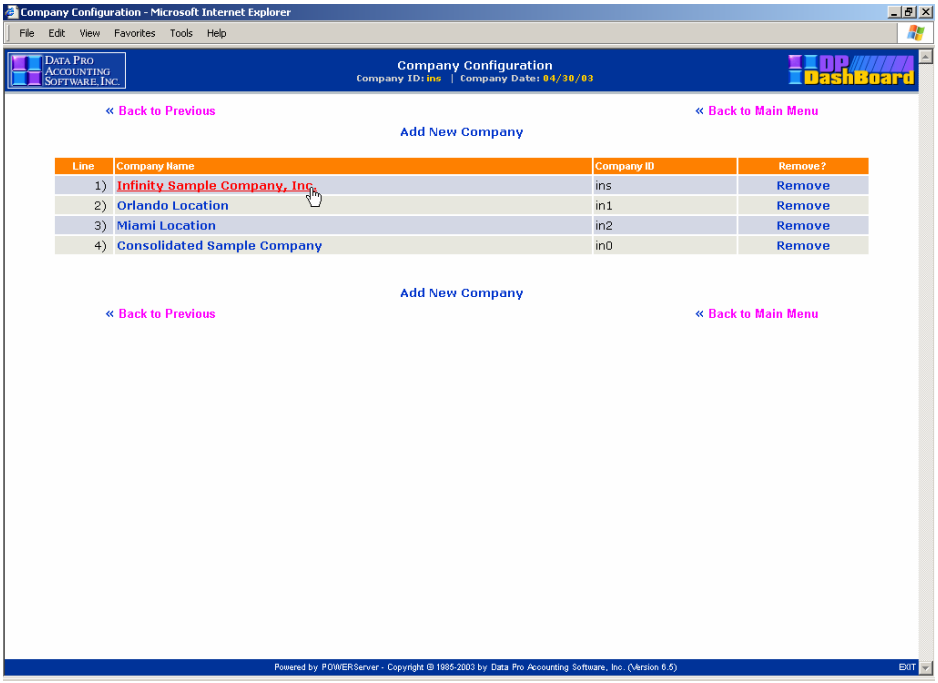


Figure 3-54. Company Configuration Screen – Modify Function

1. In the Company Configuration screen (Figure 3-52), <click> the list item to be modified in the **Company Name** column. The Changing Company screen displays (Figure 3-55), indicating the line number of the item to be modified.

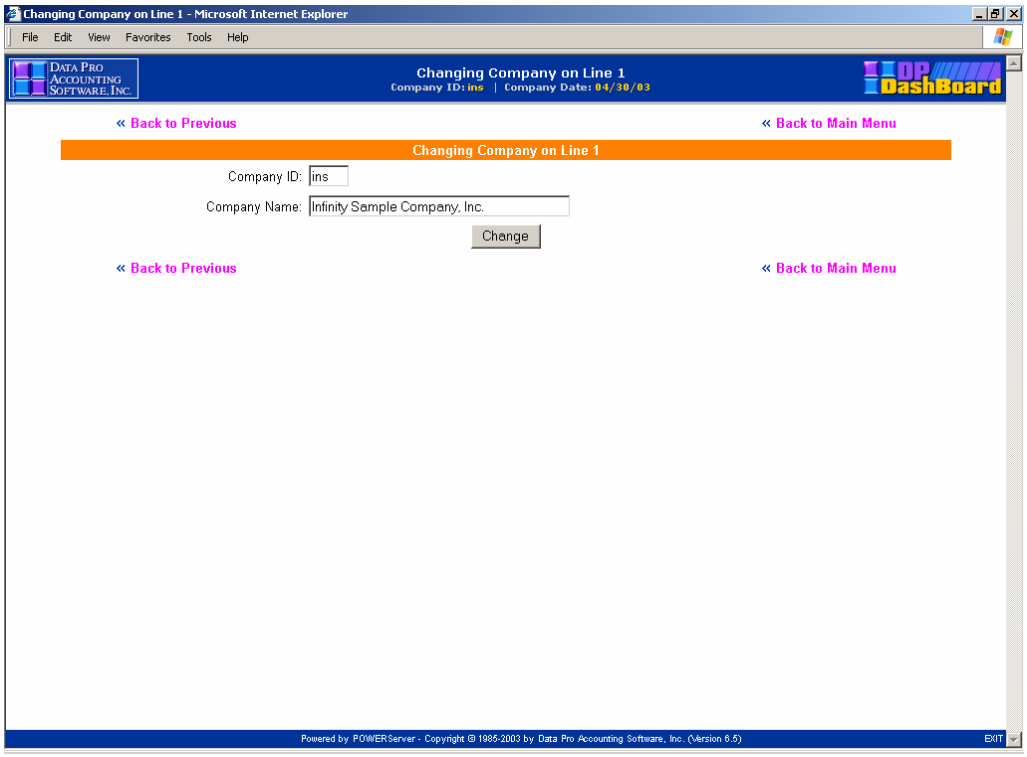


Figure 3-55. Changing Company Screen – Modify Function

The following table describes the associated properties that can be modified for each company.

Item Type	Properties to Modify
Company ID	An alpha/numeric text string that consists of three characters that identifies the company.
Company Name	An alpha/numeric text string that consists of 40 characters that describes the company name.

2. Make the desired changes in the **Company ID** and **Company Name** text boxes.
3. <Click> the **Save Changes** button. A message confirms the company index has been updated.
4. <Click> the **Return to Menu** option. The window closes and returns to the Company Configuration screen, where the list of companies is now updated with the new changes. The modifications are also updated throughout all applicable sections of the DP/DashBoard program.

To Remove a Company:

This option allows you to delete companies once they have been added to the list of companies in the Company Configuration screen.

NOTE

Removing a company will affect all functions throughout the DP/DashBoard system where selecting a company is possible.

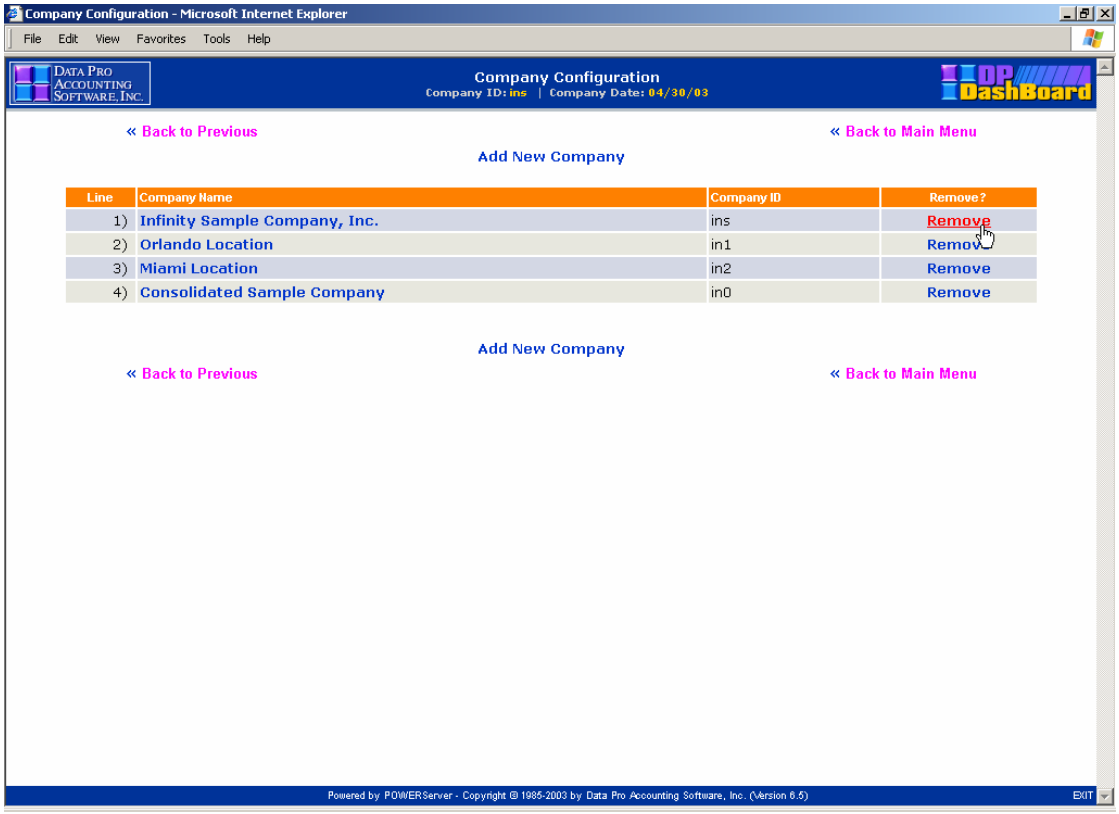


Figure 3-56. Company Configuration Screen – Remove Function

1. From the Company Configuration screen (Figure 3-52), scroll down the list of companies displayed and <click> the **Remove** option associated with the desired company to be removed (Figure 3-56). A message displays confirming the company will be removed from the menu.
2. <Click> the **OK** button to delete the company from the list of available companies. The Deleting Company screen displays (Figure 3-57), verifying the Company ID and Company Name to be deleted.

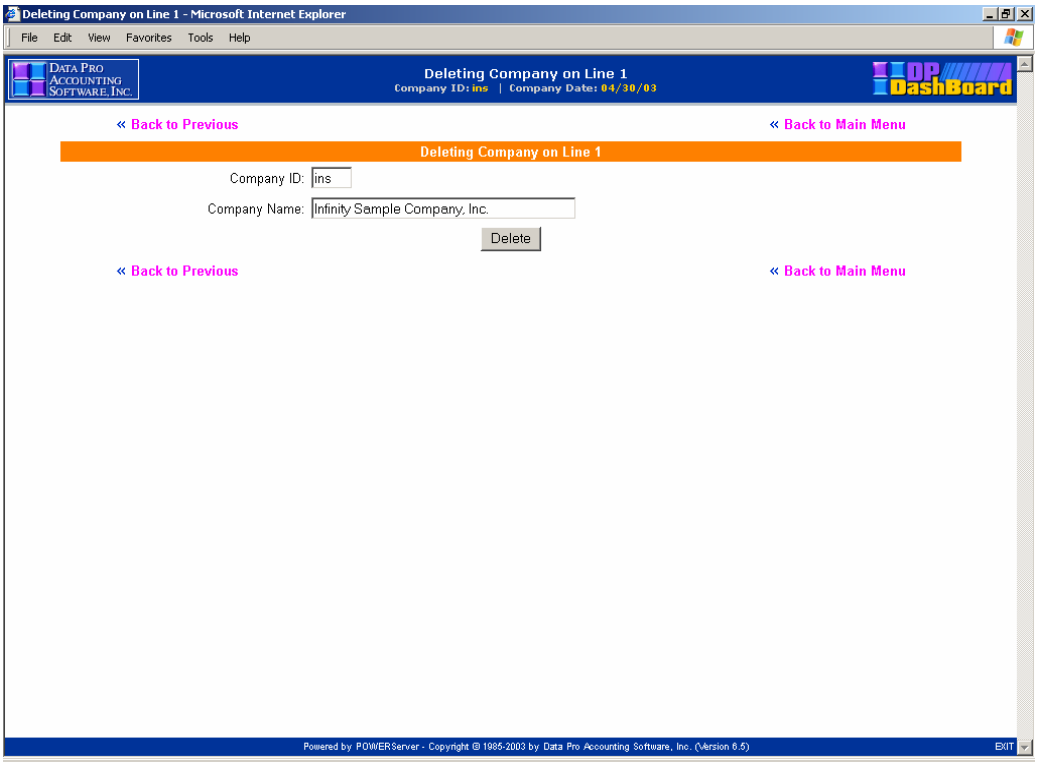


Figure 3-57. Deleting Company Screen

3. <Click> the **Delete** button to complete the remove function. A message displays confirming the company index has been updated. The window closes, and returns to the Company Configuration screen. The company has now been removed from the company list.

OR

4. <Click> the **Cancel** button to terminate the Remove function without saving any changes.

Setup Documents

The Setup Documents options are designed to allow an Administrator to add, remove, and view documents, headings, and links to other websites that are displayed in the **Documentation** section of the **DP/DashBoard Menu System** screen. The following screen illustrates the section in the upper right-hand corner of the screen (Figure 3-58) where these options are found once documents, heading, and links have been added.

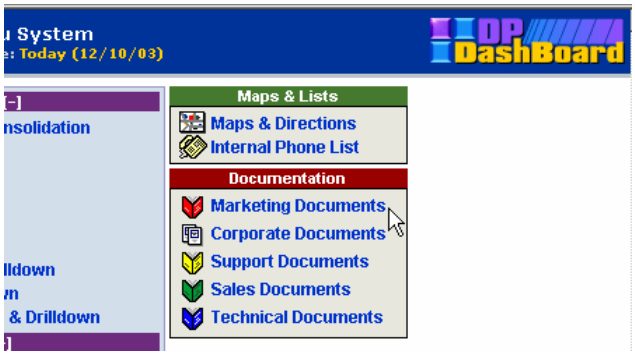


Figure 3-58. Documentation Section

From the **DP/DashBoard Administration Menu** screen (Figure 3-59), the following configurable documents options are available: Setup Marketing Documents, Setup Corporate Documents, Setup Support Documents, Setup Sales Documents, Setup Technical Documents, and Setup Ray Sheds Light.

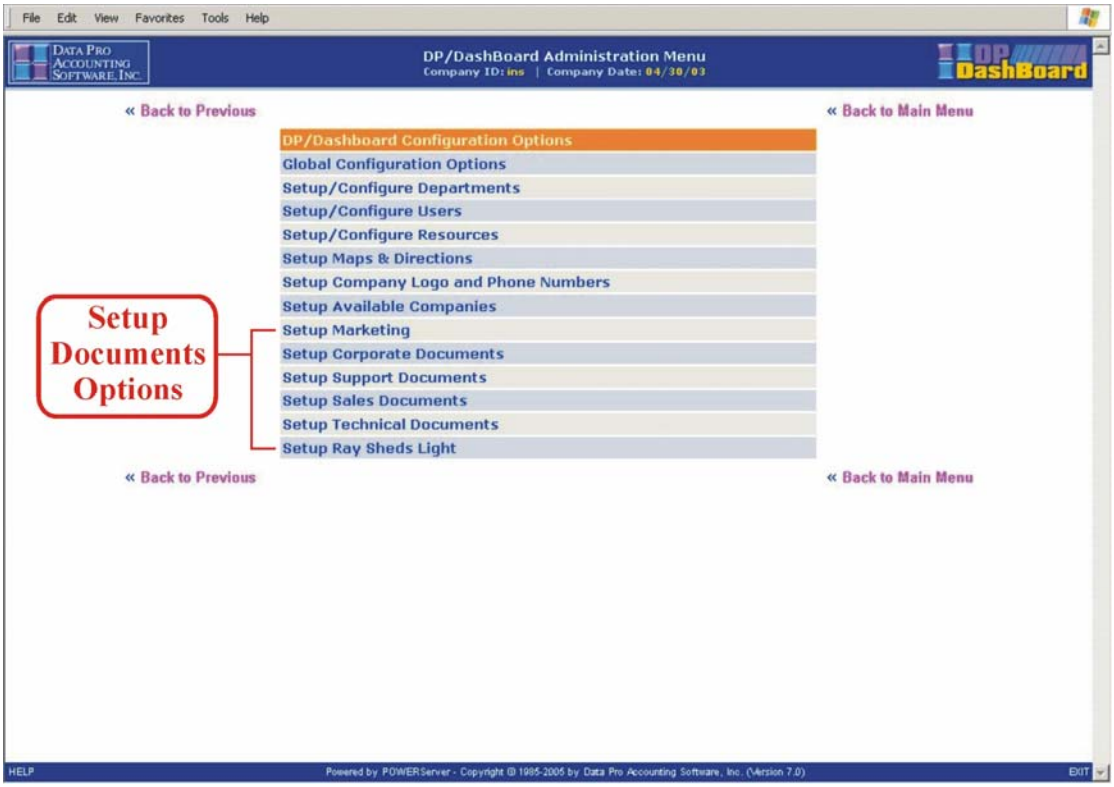


Figure 3-59. DP/DashBoard Admin. Menu – Setup Documents Options

The main menu titles of all these categories are all configurable by a user with Administrator rights. Changes made to these options will be reflected in both the DP/Dashboard Admin. menu and in the Documentation section of the **DP/Dashboard Menu System** screen (Figure 3-58). As your company initiatives and styles evolve, you can update the main menu title and main menu image to reflect these changes. Adding new headings can categorize your growing list of links and documents into groups and subgroups so that they are more effectively organized and accessible.

There are even full content document templates that come standard with **DP/DashBoard** (i.e. an Employee Manual and Company Map). Simply download these templates, customize the information for your company's needs, then add the documents to your **Documentation** section so that your staff can access them whenever they need to!

The following table describes documents you may consider for each category.

Document Type	Sample Documents
Marketing Documents	Marketing documents or links may include product price lists, new version features, order forms, upgrade information, and company references, brochures, literature kits, etc.
Corporate Documents	Corporate documents or links may include company fact sheets, organizational charts, and quarterly results documents, tax returns, 941 reports, etc.
Support Documents	Support documents or links may include IT/MIS user request forms, troubleshooting bulletins, and software error logs, customer support ticket information, etc.
Sales Documents	Sales documents or links may include product feature documents, price lists, quarterly profit comparisons, new customer fact sheets, etc.
Technical Documents	Technical documents or links may include product price lists, new version features, order forms, upgrade information, and company references, etc.
Ray Sheds Light	Do you have a **"Jack of All Trades"** employee in your company or IT department? Well, we do and it's Ray! Ray is the guy that knows it all, can get it all, and helps all. The Setup Ray Sheds Light option is designed to allow you to add, remove, and view Tips & Tricks documents and links that are displayed in the **Tips & Tricks>Ray Sheds Light** section of the **DP/DashBoard Menu System** screen. Ray Sheds Light documents may include troubleshooting suggestions, helpful hints, lessons learned, short cut functions, voice mail setup procedures, etc. This main menu category can be tailored to reflect your company's **"Ray"**. Change Ray to Mary, and change her image. Add some humor! Have some fun!

To Access a Setup Documents Screen:

1. From the DP/DashBoard Administration Menu screen (Figure 3-59), select the desired **Setup Documents** menu option. The selected Setup Documents screen (Figure 3-60) displays. The following sections will use the Setup Marketing Documents option as an example for all functions. All other Setup Documents options are identical.

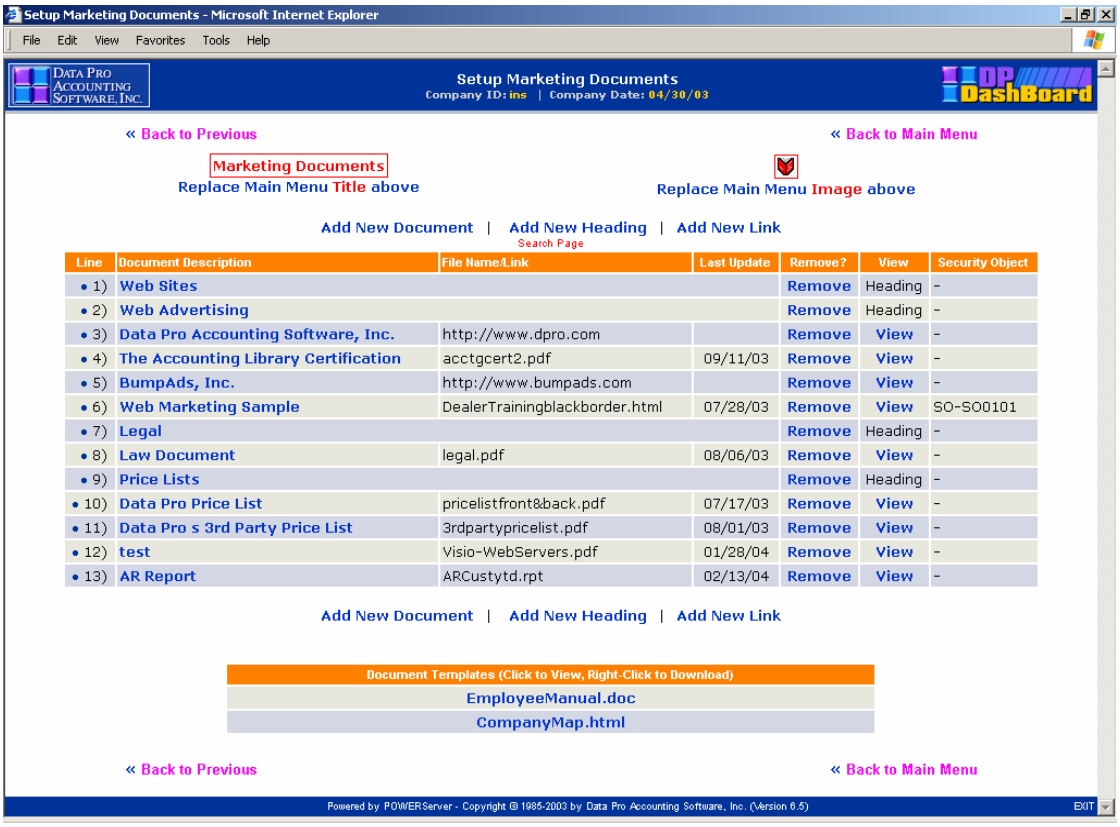


Figure 3-60. Setup Documents Screen – Marketing Documents Example

As documents are added, they are displayed in a consecutively numbered list including the following document details:

Line	Line number. System generated and automatically increments to the next highest number as documents /links are added. You can <click> on a bullet and drag/drop within the column to rearrange the order items appear in the list.
Document Description	Hyperlink. Description of document that you enter when you select the Add New Document or Add New Link option. Clicking on an item in this column will open the Changing Documents Document window for the line item you selected. This window allows you to modify the description, source file, and security information for that document. This description also displays in the Documents screen in the **DP/DashBoard Menu System** screen (see the To Modify a Document/Heading/Link section).
File Name/Link	Name of file/link of new document. System generated based on the document file selected or path to the link provided when you select the Add New Document or Add New Link option in the Setup Marketing Documents screen.
Last Update	Date of most recent update to the file/link added. This column is automatically updated as files/links are revised.
Remove?	Hyperlink. Allows you to delete a document from the selected Documents screen on the **DP/DashBoard Menu System** screen (see the To Remove a Document/Heading/Link section).

View	Hyperlink. Opens the selected document for viewing. Headings added to the list of documents in the Setup Documents screen are labeled as such in the View Column.
Security Object	System generated. Displays the security permissions allocated to that particular document that were set up when the **Add New Document** or **Add New Link** option was selected. If security permissions are modified, this column will be automatically updated.

To Replace a Document Main Menu Title:

This option allows you to rename the main menu title as it appears in the **Documentation** section of the **DP/DashBoard Menu System** screen (Figure 3-58). By default, **DP/DashBoard** is configured with the following Documentation main menu titles: Marketing Documents, Corporate Documents, Support Documents, Sales Documents, Technical Documents, and Ray Sheds Light Documents. Perhaps your company has a Public Relations Department but not a Marketing Department. Perform the following steps to rename the main menu title.

NOTE

Changing the main menu title will automatically update every screen/menu option that this name reflects.

1. From the Setup Documents screen that you wish to change the title (Figure 3-60), <click> the **Replace Main Menu Title** option to change the title as it displays in the Documentation section of the DP/DashBoard Menu System screen. The Changing Documents Main Menu Title screen (Figure 3-61) displays.

Figure 3-61. Changing Documents Category Main Menu Title Screen – Marketing Documents Example

2. Highlight the existing title in the **Main Menu Title** text box and <enter> the desired new title (ex: Public Relations).
3. <Click> the **Save Changes** button. The new title now displays on the selected Setup Documents screen and also in the appropriate Documentation section of the DP/DashBoard Menu System screen (Figure 3-62).

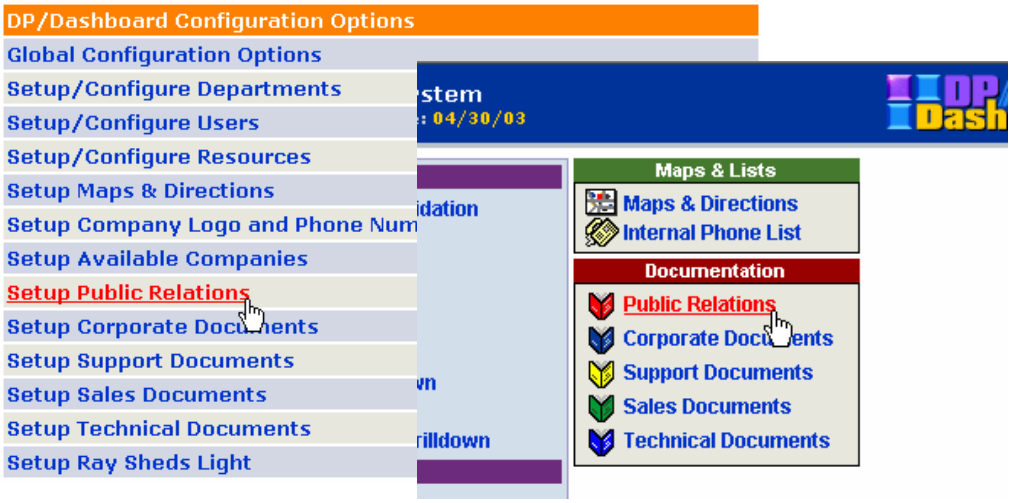


Figure 3-62. Updated DP/DashBoard Admin. Menu and Documentation Main Menu Title

To Replace a Documents Main Menu Image Icon:

This option allows you to replace the existing image icon (Figure 3-63) for this document category that displays in the **Documentation** section of the **DP/DashBoard Menu System** screen. Perform the following steps to select a new image icon.

NOTE

Remember, you may need to work with your graphics program to correctly size the icon image to fit correctly on the DP/DashBoard screen.

Figure 3-63. Documents Image Icon – Marketing Documents Example

1. From the selected Setup Documents screen (Figure 3-60), <click> the **Replace Main Menu Image above** option to select a new image icon. The Uploading the Image File in the "Documents Category" screen (Figure 3-64) displays.

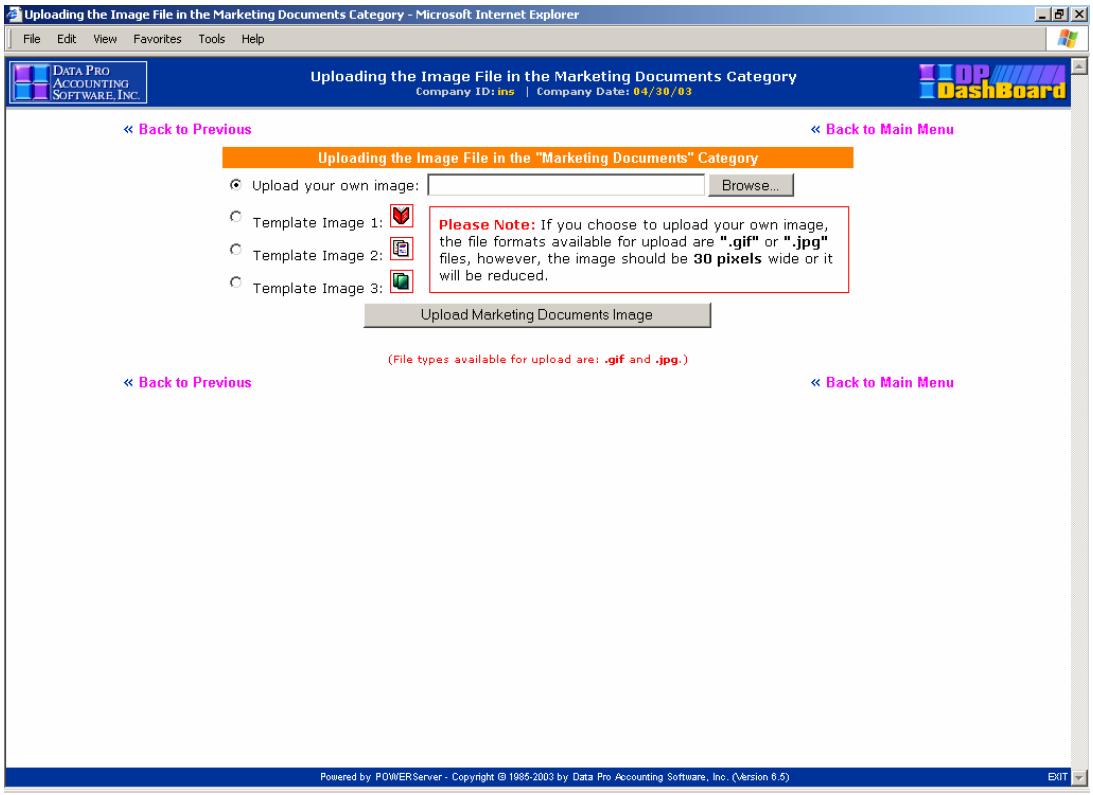


Figure 3-64. Uploading the Image File in the "Documents" Category Screen – Marketing Documents Example

2. To select a different image, <enter> the path and file name of the desired image in the **Upload your own image** text box or <click> the **Browse** button to select a path from your network. The Choose File window displays.
3. Select the appropriate folder from the **Look in** pull-down menu.
4. Select the desired image or enter the exact filename of the image in the **File name** text box.

NOTE

Images must be in *.jpg* or *.gif* format, and not exceed 30 pixels in width.

5. <Click> the **Open** button. The Choose File window closes and the selected path and file name are now displayed in the Upload your own image text box.

OR

6. <Click> the appropriate radio button to select one of the available **Template Images** (Figure 3-65).

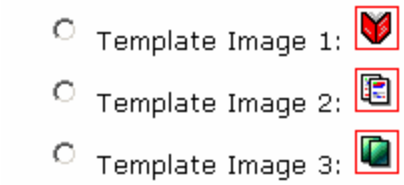


Figure 3-65. Template Images

7. <Click> the **Upload Documents Image** button. The Uploading File screen displays.
8. <Click> the **Return to Main Menu** option. The Upload Image screen closes. The new image is updated in the selected Setup Documents screen and in the Documentation section of the DP/DashBoard Menu System screen.

To Add a New Documents Document:

This option allows you to add a new document that is accessible from the **Documentation** section of the **DP/DashBoard Menu System** screen. Perform the following steps to add a new document.

1. From the selected Setup Documents screen (Figure 3-60), <click> the **Add New Document** option. The Adding New Documents Document screen (Figure 3-66) displays.

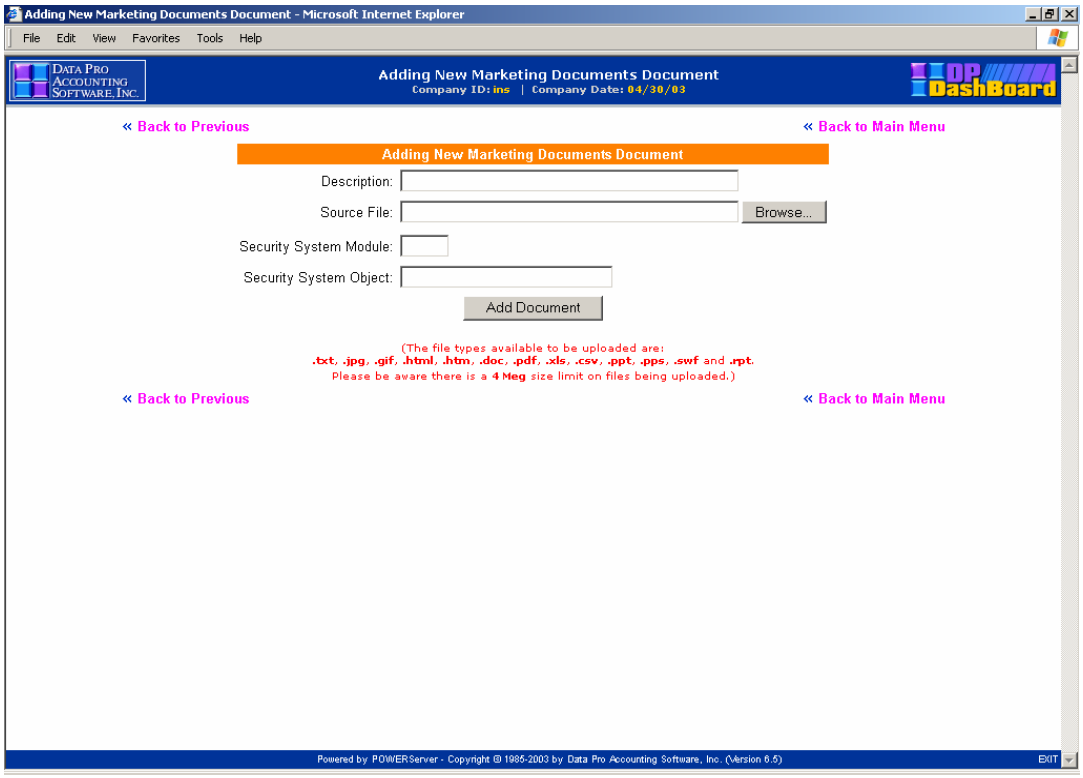


Figure 3-66. Adding New Documents Document Screen – Marketing Documents Example

2. <Enter> a description of the document in the **Description** text box.
3. In the **Source File** section, <click> the **Browse** button. The Choose file window displays.
4. Select the appropriate folder from the **Look in** pull-down menu from the **Choose file** window.
5. Select the desired file or type in the exact filename of the document in the **File name** text box.

NOTE

The file types available to be uploaded are *.txt*, *.jpg*, *.gif*, *.html*, .htm, *.doc*, *.pdf*, *.xls*, *.csv*, *.ppt*, *.pps*, *.swf* and *.rpt*. Files cannot exceed 4 mb for upload. If documents are over 4 mb an error will display. You can alternatively upload a large document by making it a link on your network. Then in **DP/DashBoard** use the **Add New Link** option to add the document.

6. <Enter> the abbreviation for the **Infinity POWER** accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.). If you want everyone to have access to this document, then leave this option blank.

NOTE

If certain documents are sensitive such as certain accounting functions, then grant similar security rights from the accounting system's Advanced Security Administrator module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects. Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.).

7. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. DP/DashBoard security objects are defined in the ***Security Objects Definitions Reference Manual*** found in your **System Administrator User Manual**.

8. <Click> the **Add Document** button. The Adding Documents Document screen closes and the new document now displays in the selected Setup Documents screen and also in the Documentation>section of the DP/DashBoard Menu System screen.

To Add a New Documents Heading:

This option allows you to add a new heading that is accessible from the **Documentation** section of the **DP/DashBoard Menu System** screen.

This is really useful if you want to categorize documents within a group (ex: Product Sheets). Perform the following steps to add a new heading.

1. From the selected Setup Documents screen (Figure 3-60), <click> the **Add New Heading** option. The Adding New Documents Heading screen (Figure 3-67) displays.

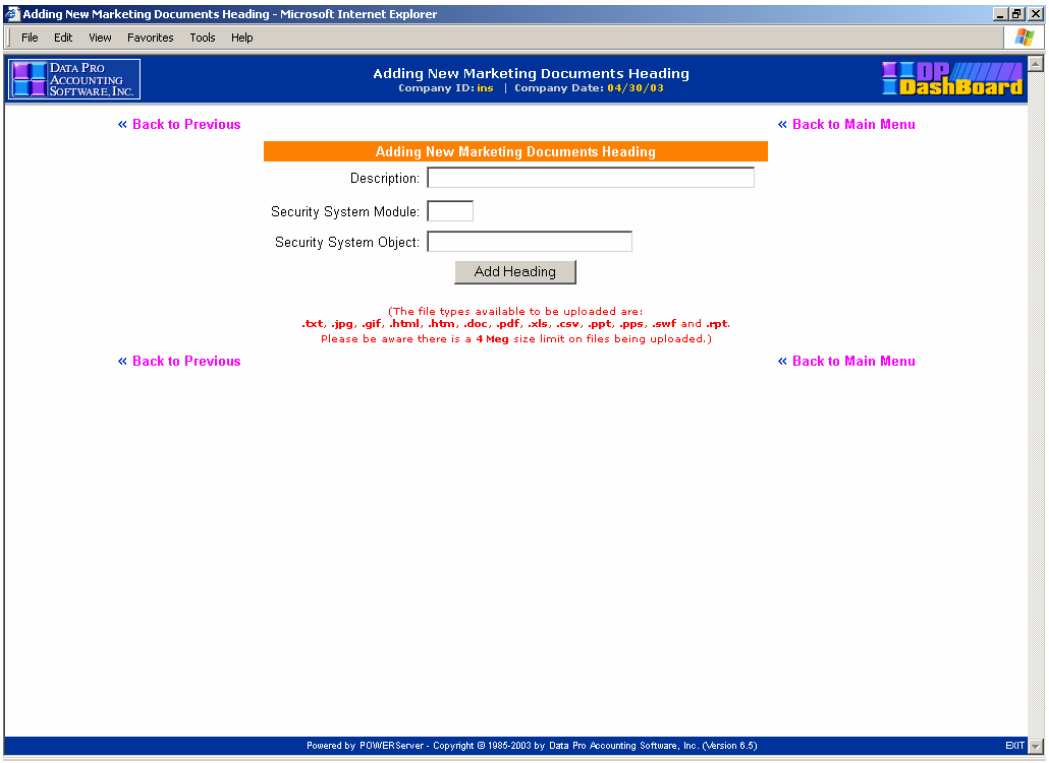


Figure 3-67. Adding New Documents Heading Screen – Marketing Documents Example

2. <Enter> the New Heading in the **Description** text box.
3. <Enter> the abbreviation for the Infinity POWER accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.). If you want everyone to have access to this document, then leave this option blank.

> **NOTE**
>
> If certain documents are sensitive such as certain accounting functions, then grant similar security rights from the accounting system's Advanced Security Administrator module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects. Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.).

4. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

NOTE

The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. DP/DashBoard security objects are defined in the ***Security Objects Definitions Reference Manual*** found in your ***System Administrator User Manual***.

5. <Click> the **Add Heading** button. A message displays confirming the document index has been updated.
6. <Click> the **Return to Menu** option. The Adding New Documents Heading screen closes and the new heading now displays as a list item in the selected Setup Documents screen as well as in the Documentation section of the DP/DashBoard Menu System screen.

To Add a New Documents Link:

This option allows you to add a new link to a website that is accessible from the **Documentation** section of the **DP/DashBoard Menu System** screen.

Perform the following steps to add a new link.

1. From the Setup Documents screen (Figure 3-60), <click> the **Add New Link** option. The Adding New Documents Link screen (Figure 3-68) displays.

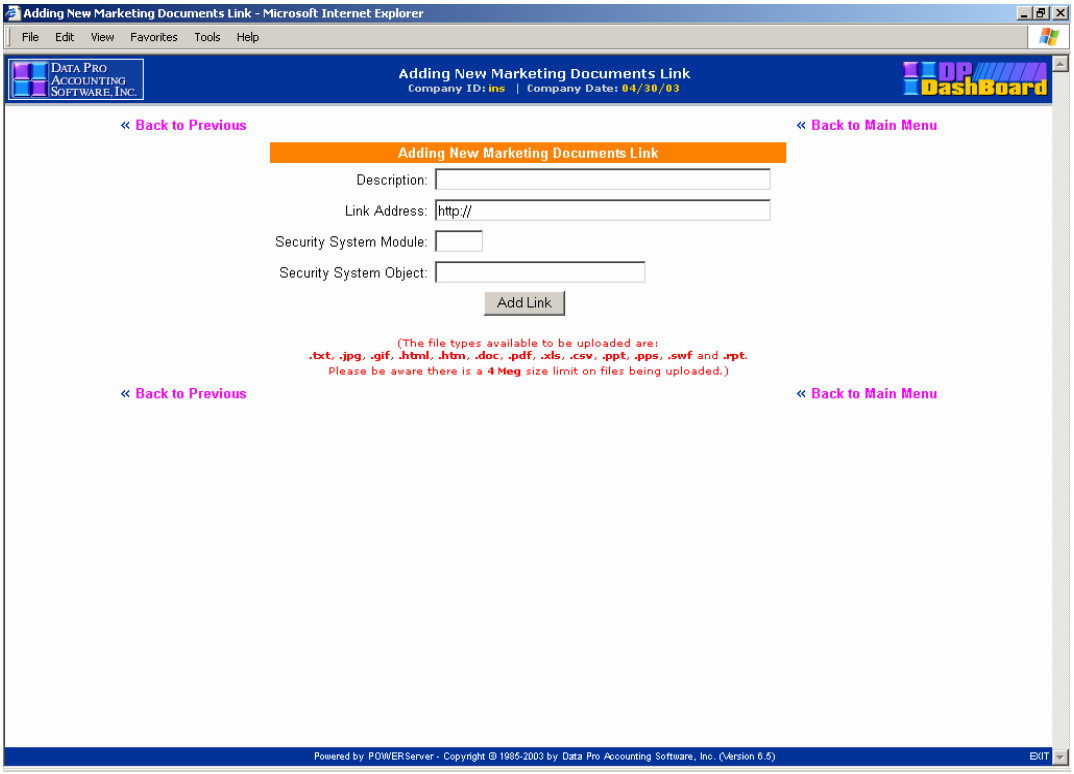


Figure 3-68. Adding New Documents Link Screen – Marketing Documents Example

2. <Enter> a description of the document in the **Description** text box.
3. <Enter> the path to the desired website in the **Link Address** text box.

4. <Enter> the abbreviation for the Infinity POWER accounting module whose rights you want to emulate for this document in the **Security System Module** text box, if you want to limit who has rights to view this document (i.e. This could be AR for Accounts Receivable or SO for Sales Order Entry users, etc.). If you want everyone to have access to this document, then leave this option blank.

> **NOTE**
>
> If certain documents are sensitive such as certain accounting functions, then grant similar security rights from the accounting system's Advanced Security Administrator module. If only people who have rights to G/L should see this document, then assign a GL security object. If A/R users should only have access to the file, then assign an AR security object. These rights can be granted down to a specific menu option level, which is essentially the function of security objects. Therefore, if you choose G/L, choose an option all GL users have rights to or pick an option that only a couple of users have access to, depending on your objectives (i.e. Print Chart of Accounts (GL0209) would be a security object most GL users would have access to. Print Balance Sheet (GL0202) is a security object most GL users would not have access to.).

5. <Enter> the specific security code (i.e. GL0202) in the **Security System Object** text box.

> **NOTE**
>
> The Security System Module and Security System Object categories must be entered exactly as they are defined in all **Infinity POWER** programs. The Advanced Security Administrator module lists out all security objects by module. DP/DashBoard security objects are defined in the ***Security Objects Definitions Reference Manual*** found in your **System Administrator User Manual**.

6. <Click> the **Add Link** button. The Adding New Document Link screen displays, confirming the document index has been updated. The window closes and returns to the selected Setup Documents screen. The new document link now displays in the list of documents and also in the selected Documentation section of the **DP/DashBoard** Menu System screen.

To Modify a Documents Document/Heading/Link:

This option allows you to modify the properties set up for documents, headings, and links that have been added to the list of items in the Setup Documents screen (Figure 3-60) and accessible in the **Documentation** section of the **DP/DashBoard Menu System** screen.

The following table describes the associated properties that can be modified for each of the item types listed in the Setup Documents screen.

Item Type	Properties to Modify
Document	Description, Source File, Security System Module, Security System Object. The current file name is displayed as well as the date of last update.
Heading	Description, Security System Module, Security System Object
Link	Description, Link Address, Security System Module, Security System Object.

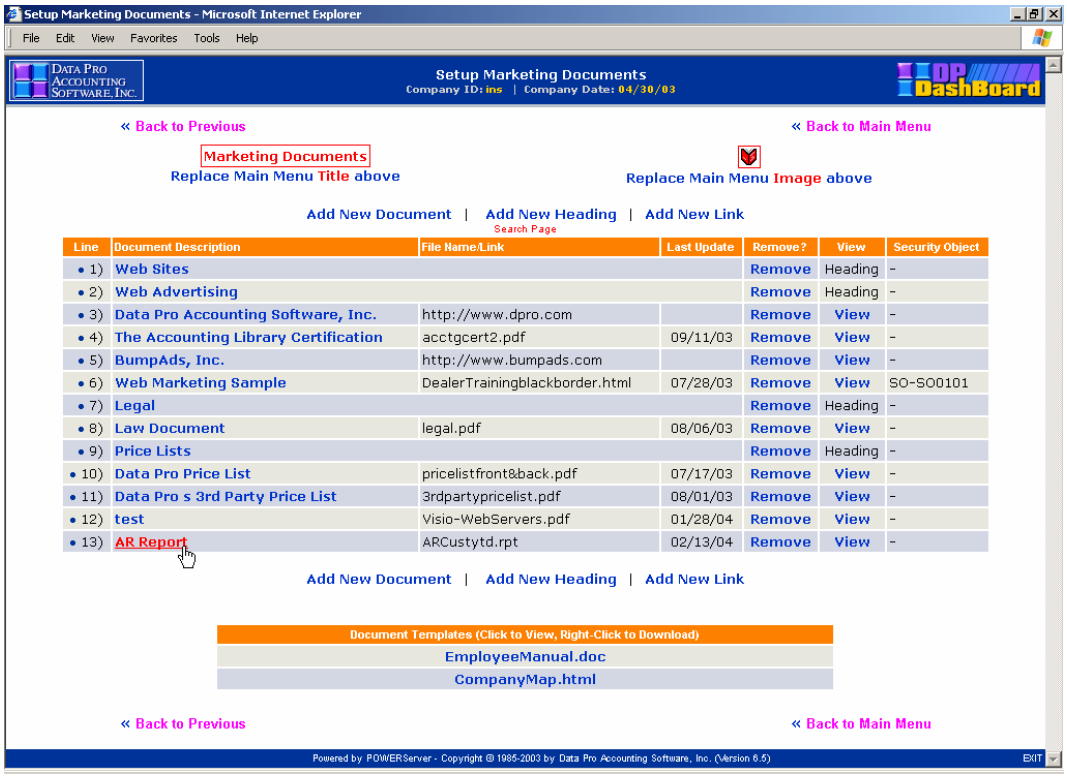


Figure 3-69. Setup Documents Screen > Modify Function – Marketing Documents Example

1. In the Setup Documents screen, <click> the list item to be modified in the **Document Description** column (Figure 3-69). The Changing Documents Document/Heading/Link screen (Figure 3-70) displays, indicating the line number of the item to be modified.

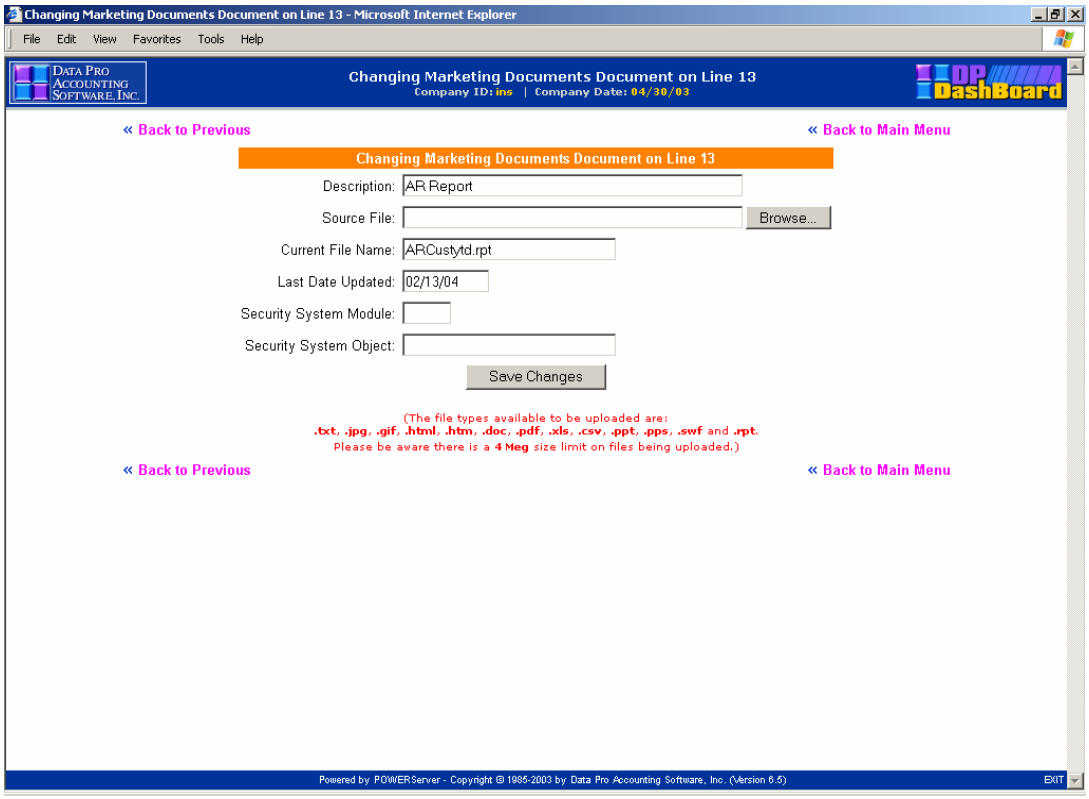


Figure 3-70. Changing Documents Document/Heading/Link Screen > Modify Function – Marketing Documents Example

2. Depending on the item selected, make the desired changes in the applicable modifiable options.
3. <Click> the **Save Changes** button. A message confirms the document index has been updated.
4. <Click> the **Return to Menu** option. The window closes and returns to the selected Setup Documents screen. The modifications are now updated in the document list in the selected Setup Documents screen and in the Documentation section of the DP/DashBoard Menu System screen.

To Remove a Document/Heading/Link:

This option allows you to delete documents, headings, and links that have been added to the list of items in the Setup Documents screen and in the **Documentation** section of the **DP/DashBoard Menu System** screen.

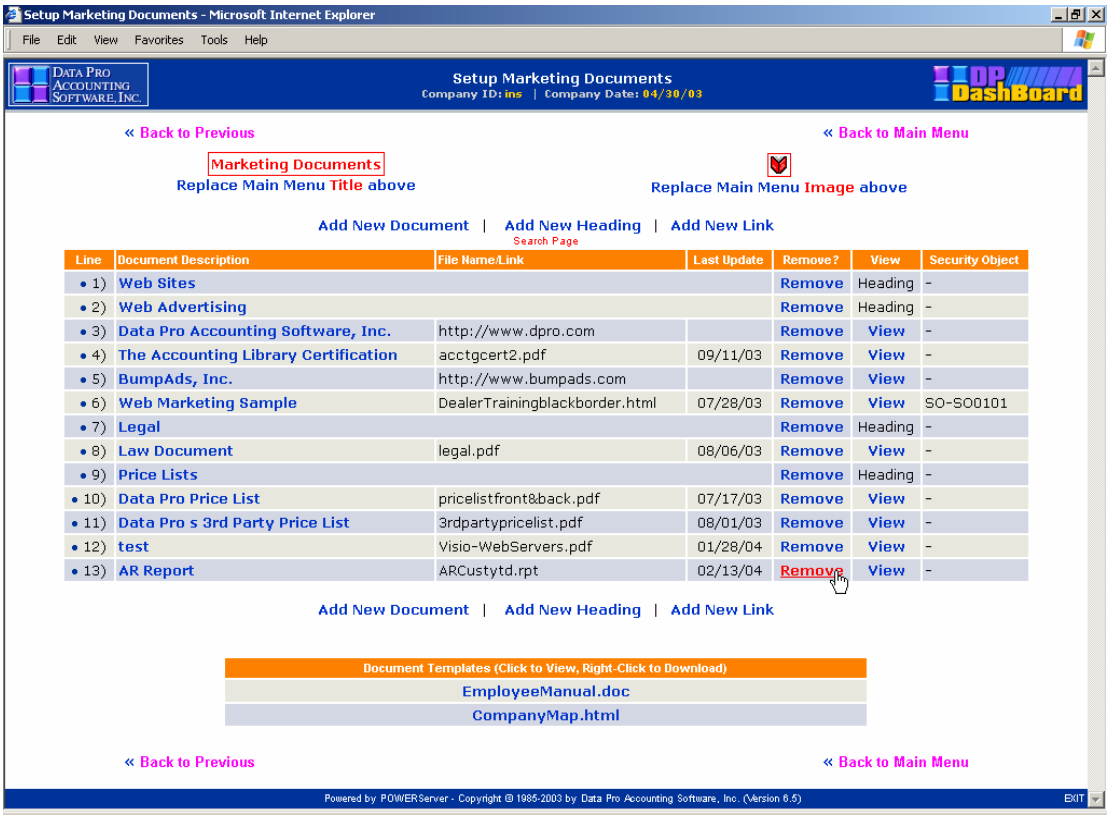


Figure 3-71. Setup Documents Screen>Remove Function – Marketing Documents Example

1. In the Setup Documents screen, <click> the **Remove** option from the **Remove?** column for the item to be deleted (Figure 3-71). The Deleting Documents Document/Heading/Link screen (Figure 3-72) displays, indicating the line number of the item to be deleted.

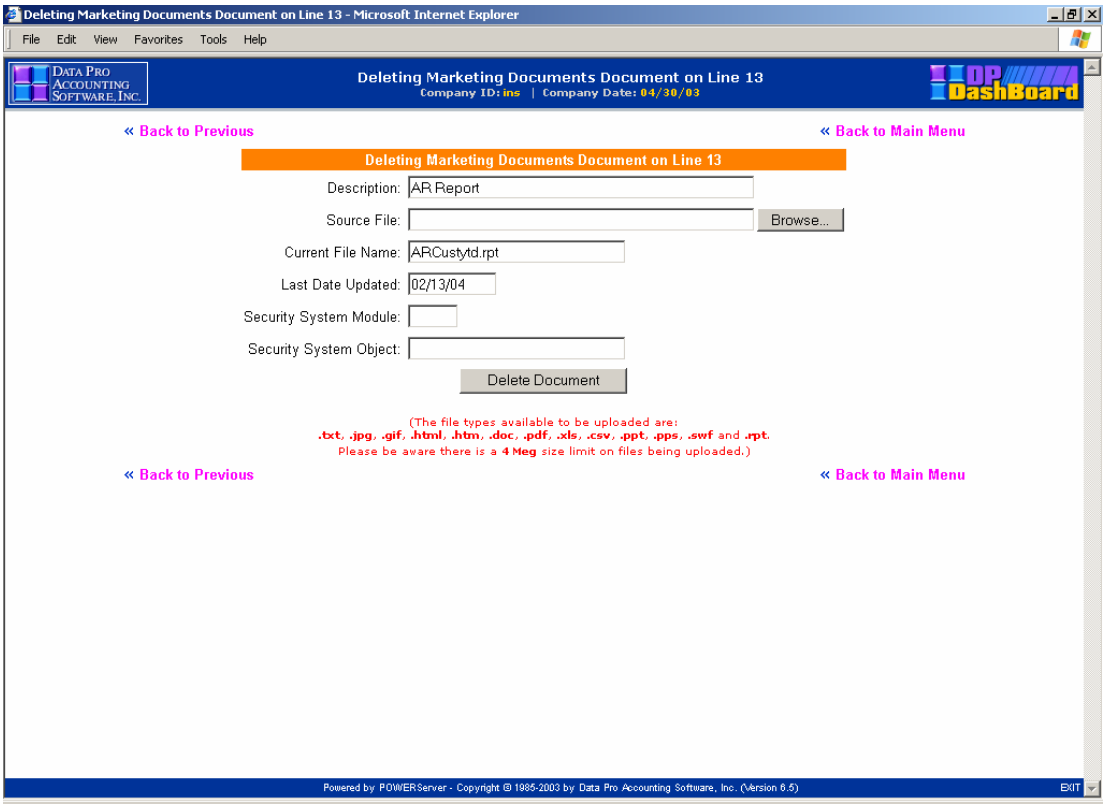


Figure 3-72. Deleting Documents Document/Heading/Link Screen >Remove Function – Marketing Documents Example

2. <Click> the **Delete Document/Heading/Link** button. A message confirms the document index has been updated.
3. <Click> the **Return to Menu** option. The window closes and returns to the selected Setup Documents screen. The selected item has been deleted from the document list in the selected Setup Documents screen and in the Documentation section of the DP/DashBoard Menu System screen.

To View a Document/Heading/Link:

This option allows you to view documents and links that have been added to the list of items in the Setup Documents screen (Figure 3-60) and in the **Documentation** section of the **DP/DashBoard Menu System** screen. Selecting the view function will automatically open the selected document or launch the website associated with the selected link.

NOTE

Headings can only be viewed by selecting a main menu title from the **Documentation** section of the **DP/DashBoard Menu System** screen.

Figure 3-73. Setup Documents Screen>View Function – Marketing Documents Example

1. In the Setup Documents screen, <click> the **View** option from the **View** column (Figure 3-73) for the item to be opened. The document or website automatically opens for viewing.

To Download a Document Template:

This function allows you to download documents that are listed in any of the Setup Documents screens or templates from the Document Templates section at the bottom of the screen.

1a. In the selected Setup Documents screen, <right-click> the desired document or template to be downloaded (Figure 3-74) and select the **Save Target As** option. The Save As window (Figure 3-75) displays.

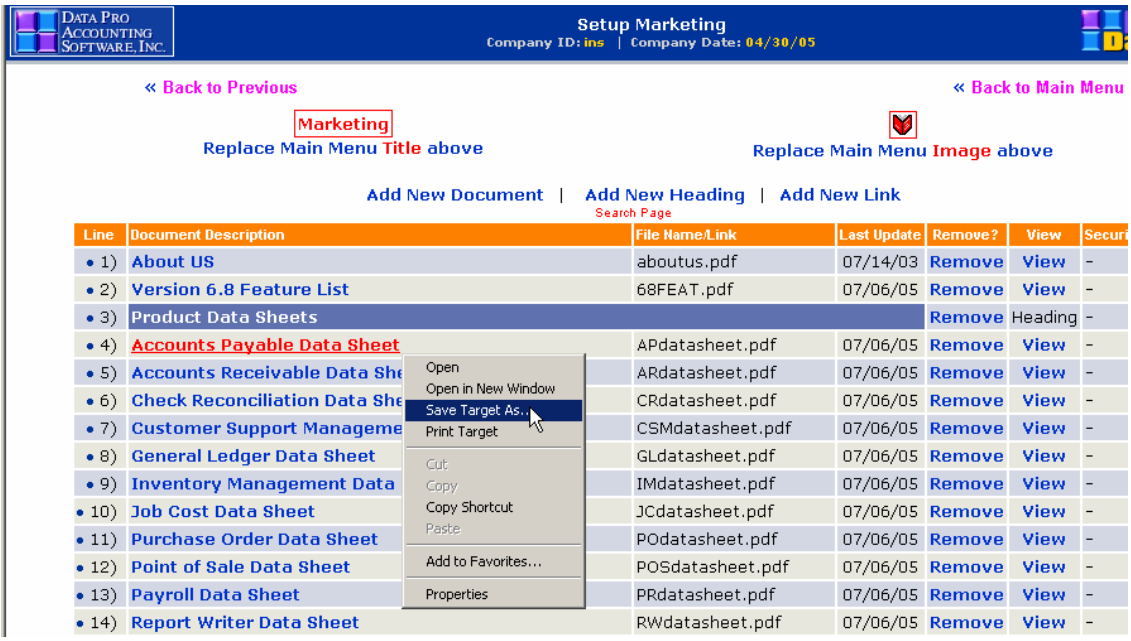


Figure 3-74. Setup Documents>Download Document Template Function – Marketing Documents Example

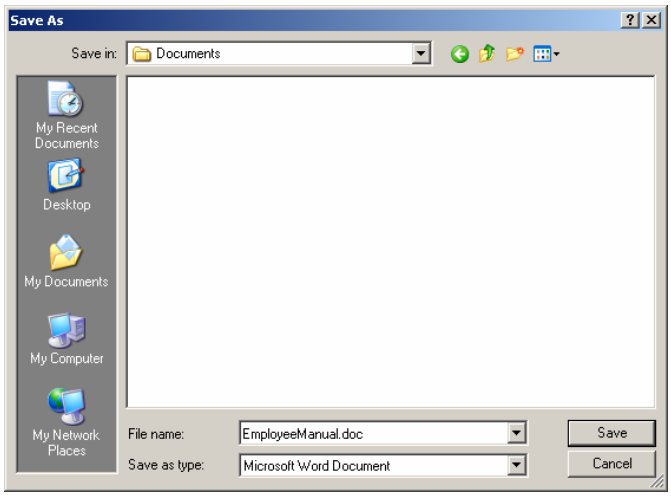


Figure 3-75. Save As Window

2. Select the desired directory to download the file into from the **Save In** pull-down menu.
3. If desired, rename the document in the **File Name** pull-down menu.
4. If appropriate, change the file type in the **Save as type** pull-down menu.
5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

Color Styles Setup

This option allows you to customize the color settings used throughout the **DP/DashBoard** GUI (Graphical User Interface) screens.

The following screen (Figure 3-76) illustrates the section on the left side of the screen where this option is displayed.

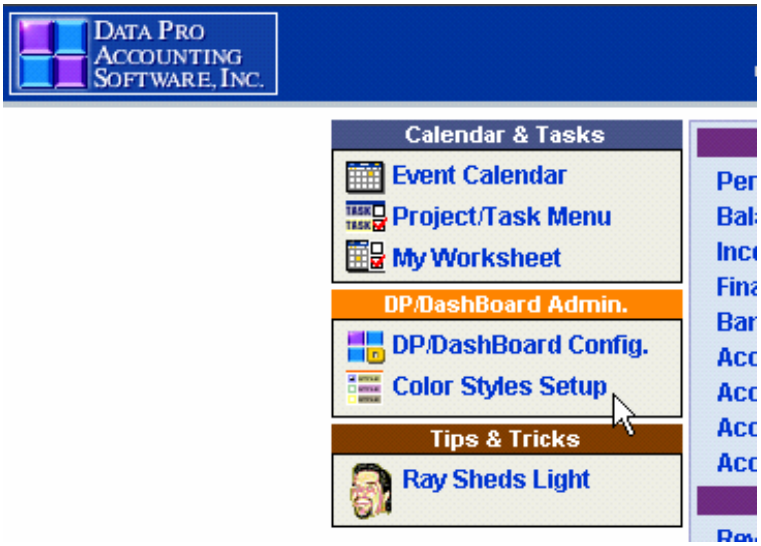


Figure 3-76. DP/DashBoard Admin. Section>Color Styles Setup

To Change the Color Style of the DP/DashBoard Screens:

1. On the left side of the DP/DashBoard Menu System screen, select the **Color Styles Setup** option (Figure 3-76) from the **DP/DashBoard** Admin. section. The Site Management Utility screen (Figure 3-77) displays.

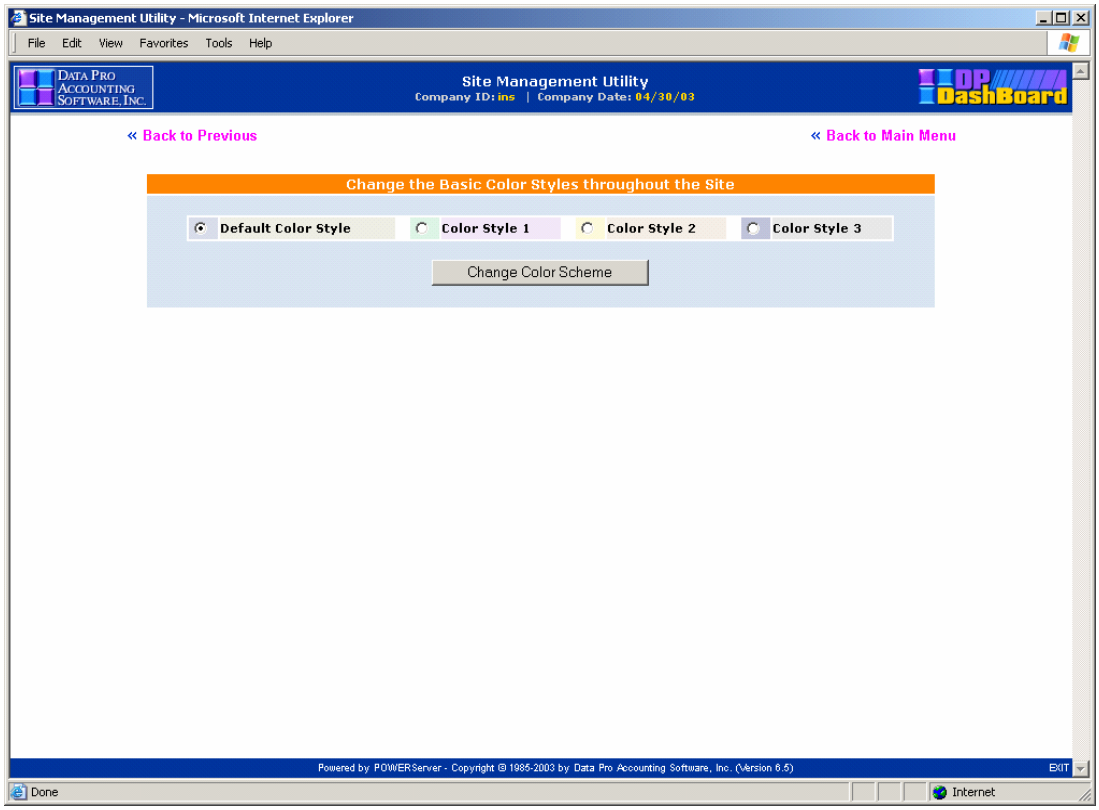


Figure 3-77. Site Management Utility Screen

2. <Click> the appropriate **Color Style** radio button to select the desired color scheme.
3. <Click> the **Change Color Scheme** button. The color scheme display box changes to the primary color selected.
4. <Click> the **Return to Main Menu** option to return to the DP/DashBoard Menu System screen. The selected color scheme is applied throughout the program.

CALENDAR & TASKS

The **Calendar & Tasks** section of the DP/DashBoard Menu System screen consists of the Event Calendar, Project/Task Menu, and My Worksheet options. These are very powerful tools that are designed to allow for company wide use. This includes a single calendaring tool for a single office or even multiple offices as well as a Project Task Management system designed to allow you to keep track of a variety of things to be done, both personally and professionally. Configurable items in the section can be defined in the **DP/DashBoard Admin** section of the DP/DashBoard Menu System screen.

These features are accessible in the Calendar & Tasks section of the DP/DashBoard Menu System screen (Figure 3-78).

NOTE

<Clicking> the company logo in the left top corner of the screen from any of the Calendar & Tasks menu option screens brings you back to the DP/DashBoard Menu System Screen. This function applies to this section only. The logo defaults to the Data Pro logo and should be replaced by your company's logo from the **DP/DashBoard Admin > DP/DashBoard Config** option of the Menu System screen.

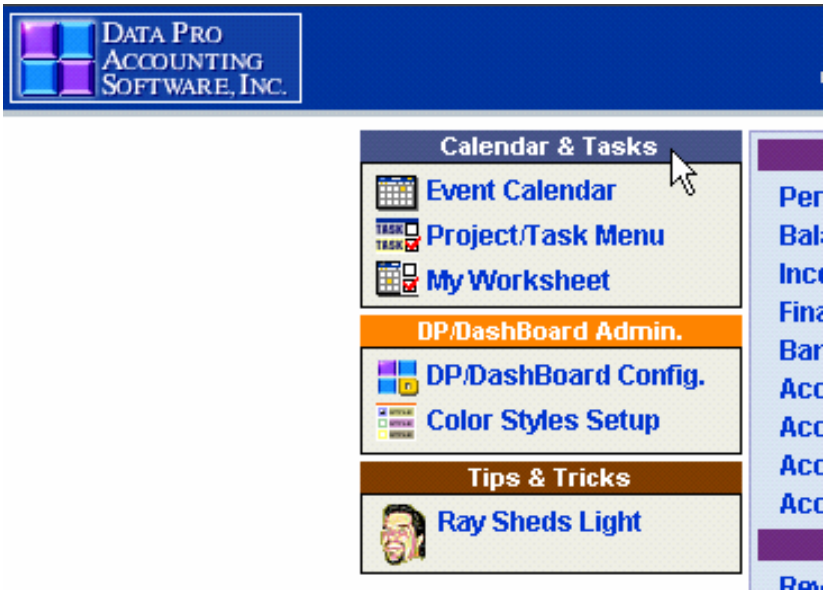


Figure 3-78. Calendar & Tasks Section

Event Calendar

The Event Calendar system is designed to allow each individual to maintain their own **"personal schedules"** on the system, in private, so that when other users are booking events that include them, the system has the ability to determine whether they are available or not to be included. Events are meetings, appointments, conference calls, To-Do's, demos and more!

NOTE

With the integration of the event triggering system, **DP/Auto**, a daily notification of the calendar events can be sent to specified e-mail addresses set up in **DP/Dashboard** by utilizing the "**calendaralerts**" script. See the ***DP/Auto User Manual*** for further details.

The following screen illustrates where the **Calendar & Tasks>Event Calendar** option (Figure 3-79) is located on the DP/DashBoard Menu System screen.

Figure 3-79. Calendar & Tasks>Event Calendar

To Access the Calendar Screen:

1. On the left side of the DP/DashBoard Menu System screen, select the **Event Calendar** option (Figure 3-79) from the Calendar & Tasks section. The Calendar screen (Figure 3-80) displays defaulting to the current month using and additional browser window.

NOTE

You may resize this window to your preferences. This way you can go between the Calendar window and the main menu consistently by just clicking between browser sessions. You may use the **ALT TAB** key to easily switch between open sessions.

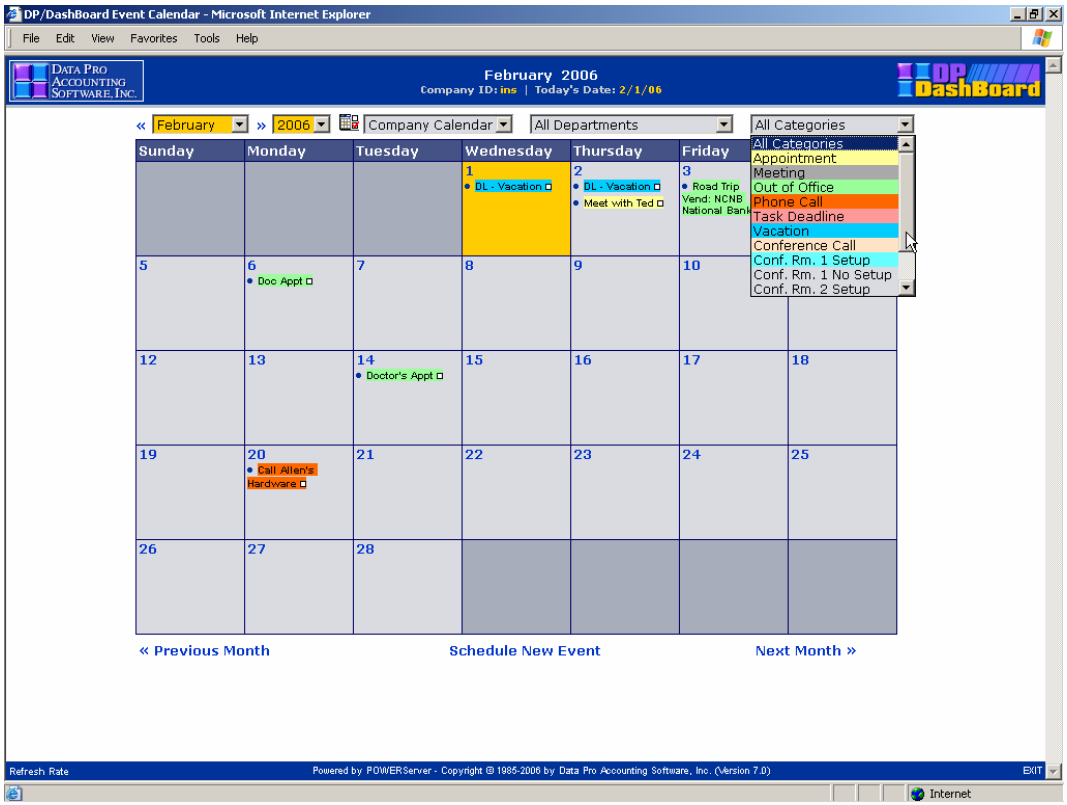


Figure 3-80. Calendar Screen

The following table describes the **Calendar** screen details.

Month	Clicking this pull-down menu allows you to select the calendar month you would like to view. You can also click the << and >> to select the desired month.
Year	Clicking this pull-down menu allows you to select the desired calendar year month you would like to view.
	Opens the My Weekly Calendar and Task Worksheet Screen. From here you can add new tasks and then add them to the Event Calendar.
Calendar	Clicking this pull-down menu toggles between My Calendar, and Corporate Calendar. My Calendar shows only your personal events. Corporate Calendar shows the entire corporate calendar plus any events you have made "public".
Departments	Clicking this pull-down menu allows you to select All Departments or a specific department. Only the specified events will display on the calendar.
Categories	Clicking this pull-down menu allows you to select All Categories or a specific category of events to display on the calendar (e.g. appointments, phone calls, vacations, etc).
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.

To View a Specific Calendar:

1. From the top of the Calendar screen (Figure 3-80), click the **<<** option to select the previous month or click the **>>** option to select the next month in the first pull-down menu. The selected month displays in full view and is listed in the pull-down menu.
2. From the second pull-down menu, select the desired **Calendar Year**. The selected calendar year displays in full view and is listed in the pull-down menu.
3. From the third pull-down menu, select the **Company Calendar** option to view the full corporate calendar or the **My Calendar** option to view only your personal calendar entries. The selected calendar displays in full view and is listed in the pull-down menu.
4. From the fourth pull-down menu, select the desired **Department** to only view that department's calendar entries. The selected department calendar displays in full view and is listed in the pull-down menu.
5. From the fifth pull-down menu, select the desired **Category** to only view entries related to the specified category. The selected category entries display in full view and are listed in the pull-down menu and in the calendar below.

NOTE

These combinations of pull-down menus are a great way of isolating just the information you want to see at once. You may see everything combined or just one group.

To Schedule a New Event:

This option allows you to schedule a new event to the calendar. User permissions determine which users can view certain events from the corporate calendar. When scheduling an event to the calendar, you can invite attendees such as internal staff, as well as prospects, customers, or vendors. All invitees will receive an e-mail confirmation of the event. You can also reserve resources such as conference rooms and media equipment.

NOTE

Events added to your personal calendar cannot be viewed by anyone but you.

1. From the Calendar screen (Figure 3-80), click the **Schedule New Event** option. The Scheduling New Event screen (Figure 3-81) displays.

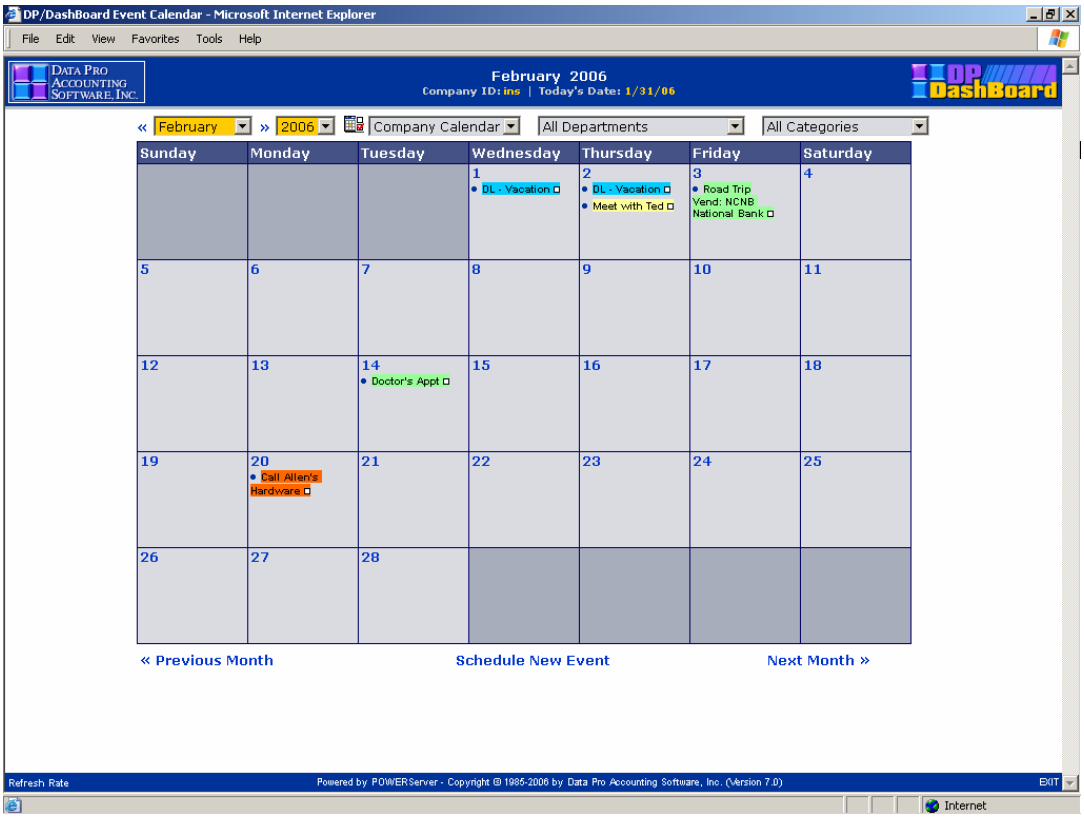


Figure 3-81. Scheduling New Event Screen

The following table describes the **Scheduling New Event** screen details.

Description	Text box. Enter a description of the new event (i.e. appointment, meeting, conference call, etc.).
Event Date	Display box. Click the calendar icon to select the date of the event. Defaults to the current date.
Start/End Time	Pull-down menus. Displays the start/end time of the event. Defaults to 8:00 am for both time options. Increments in five minute intervals.
User ID	Defaults to the User ID currently logged into the DP/DashBoard program.
Type	Pull-down menu. The following options describe the event type: Public – Event is open to anyone with access to the calendar. Depart Only – Event is to be viewed only by those who have access to a specified department. Attendees – Viewed only by selected attendees. Attendees receive an invitation to the event via email. Accepting the event will update the attendees' personal calendars. Private – Event can only be viewed by the user adding the event.
Department	Pull-down menu. Options describe the department the event is associated with. Defaults to the department the current user is associated with.

Category	Pull-down menu. Options describe the category of the event (e.g. appointment, meeting. phone call). Defaults to Appointment. These categories may be have specified colors to identify the event on the calendar. These colors can be configured under **DP/DashBoard Config. Main Menu >Gobal Configuration Options**.
Event Status	Pull-down menu. Describes the status of the event (e.g. Open, Complete, Cancelled).
Comments	Text Box. Enter any specific details about the event.
Available Attendees	Scroll list displaying all possible people available to select to attend the event.
Selected Attendees	Display box listing the selected event attendees from the Available Attendees display box. Avoids conflicts.
Available Resources	Scroll list displaying all available resources that can be reserved for the event (e.g. conference rooms, equipment, etc.) Avoids conflicts.
Selected Resources	Display box listing the resources selected for reservation from the Available Resources display box.
Select Customer	Clicking on this option opens the Select Customer for this Event screen. You can select a customer to add to the event by searching by customer number or name. Customers selected will be sent an e-mail confirmation for the event. You can <click> on the selected customer's name in the text box to display the Customer Information window.
Select Vendor	Clicking on this option opens the Select Vendor for this Event screen. You can select a vendor to add to the event by searching by vendor number or name. Vendors selected will be sent an e-mail confirmation for the event.
Check for Conflicts	Check box. Selecting this option will check each attendee's personal calendars and selected resources for conflicts for the specified event date and time.
Save This Event	Clicking this button saves the event and adds it to the specified calendar. Those with permissions can only view the event.
Quit Without Saving	Clicking this button closes the Schedule New Event screen without saving and returns to the Calendar screen.
Save As New Event	Clicking this button will duplicate the current event and add it to the specified calendar event as a new event. All the original options (attendees, resources, location, etc) are retained. This is very useful if the date is the only item that is different for an event. Those with permissions can only view the event.

2. Enter a description of the event in the **Description** text box.
3. <Click> the calendar icon next to the **Event Date** display box to select the desired date for the event. Hint: <Click> on **<<** to change the month/year prior to the current date, or <click> **>>** to change the month/year after the current date. The calendar closes and the selected event date displays.
4. Selected the desired event options from the **Type, Department**, **Category**, and **Status** pull-down menus.
5. Enter a description of the event details in the **Comments** text box.
6. From the **Available Attendees** scroll list, click the desired attendees for the event. As attendees are selected, they are displayed in the Selected Attendees display box.

7. From the **Available Resources** scroll list, click the desired resources to be reserved for the event. As resources are selected, they are displayed in the Selected Resources display box.
8. If desired select a **Customer** or **Vendor** to add to the event. Customers and/or vendors selected will receive an e-mail confirmation of the event.

NOTE

If resources are selected for an event, and the event is saved, the administrator for each selected resource will receive an e-mail notification of the event and the resources to be reserved.

9. Select the **Check for Conflicts** check box to automatically verify all selected attendees are available during the selected date/time of the event.
10. Click the **Save This Event** button or **Save As New Event** button to save the event and update the calendar. The Schedule New Event screen closes and returns to the Calendar screen (Figure 3-80) displaying the new event.

NOTE

Remember, each time an event is scheduled or changed, all invited attendees receive an e-mail notice!

To Select a Customer for an Event:

This option allows you to select a customer to add to an event. Once a customer is selected, they are added to the event and will receive an e-mail notification with the event details. You can only select one customer per event.

1. From the Schedule New Event Screen (Figure 3-81), <click> on the **Select Customer** button. The Select Customer by Number or Name screen (Figure 3-82) displays.

Figure 3-82. Select Customer by Number or Name Screen

2. Enter the partial or complete customer number in the **Customer Number** text box, then <click> the **Select** button. The Search Customer window (Figure 3-83) displays listing all the possible results.

OR

3. Enter the partial or complete customer name in the **Customer Name** text box, then <click> the **Search** button. The Search Customer window (Figure 3-83) displays listing all the possible results.

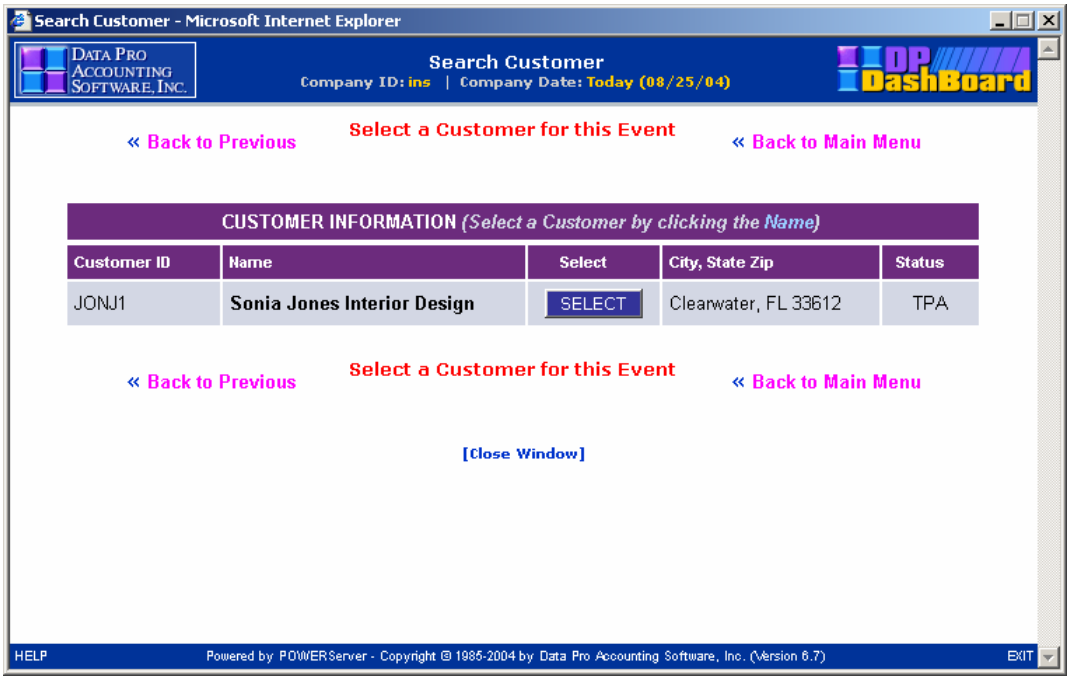


Figure 3-83. Search Customer Screen

3. <Click> the **Select** button of the desired customer to be added to the event. The window closes and returns to the Scheduling New Event screen. The selected customer now displays in the Select Customer (Figure 3-84) display box. To remove the selected customer, click the red X next to the displayed name.

NOTE

You can <click> on the selected customer's name in the text box to display the Customer Information window.

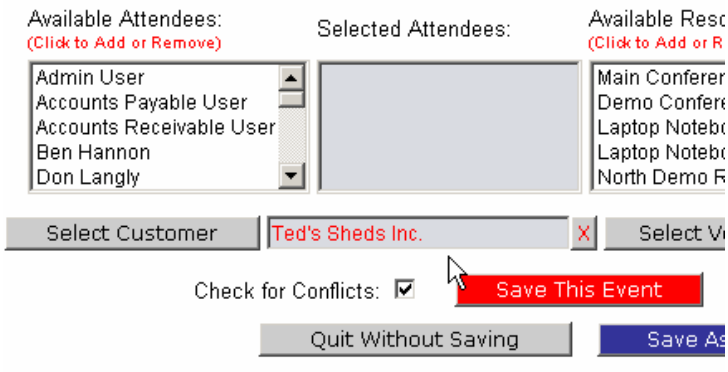


Figure 3-84. Select Customer Function>Schedule New Event Screen

To Select a Vendor for an Event:

This option allows you to select a vendor to add to an event. Once a vendor is selected, they are added to the event and will receive an e-mail notification with the event details. You can only select one vendor per event.

1. From the Schedule New Event Screen (Figure 3-81), <click> on the **Select Vendor** button. The Select Vendor by Number or Name screen (Figure 3-85) displays.

Figure 3-85. Select Vendor by Number or Name Screen

2. Enter the partial or complete vendor number in the **Vendor Number** text box, then <click> the **Select** button. The Search Vendor window (Figure 3-86) displays listing all the possible results.

OR

3. Enter the partial or complete vendor name in the **Vendor Name** text box, then <click> the **Search** button. The Search Vendor window (Figure 3-86) displays listing all the possible results.

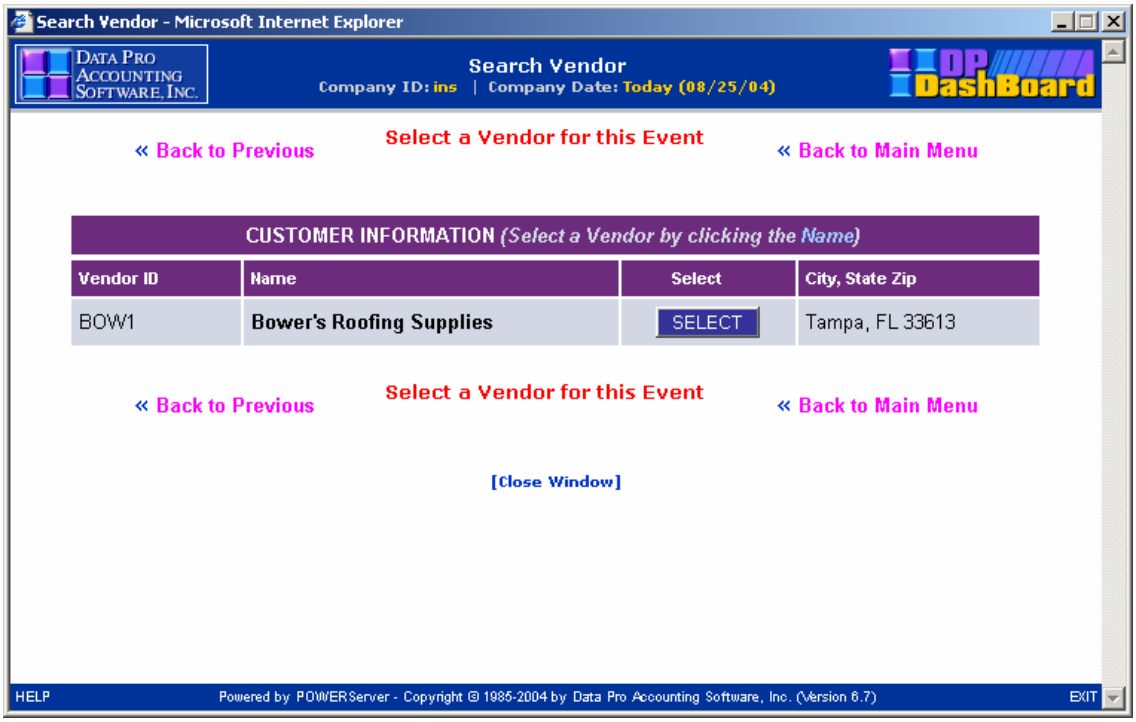


Figure 3-86. Search Vendor Screen

4. <Click> the **Select** button of the desired vendor to be added to the event. The window closes and returns to the Scheduling New Event screen. The selected vendor now displays in the Select Vendor (Figure 3-87) display box. To remove the selected vendor, click the red X next to the displayed name.

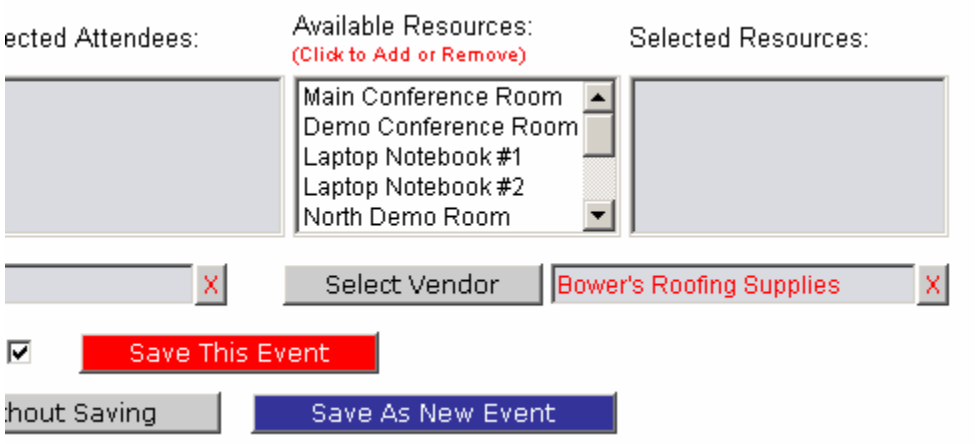


Figure 3-87. Select Vendor Function>Schedule New Event Screen

To Change an Event:

This option allows you to modify an existing event that is displayed in the **Calendar** screen (Figure 3-80).

1. From the desired calendar (see To View a Specific Calendar), <click> on the **Event** to be modified. The Changing Event screen (Figure 3-88) displays.

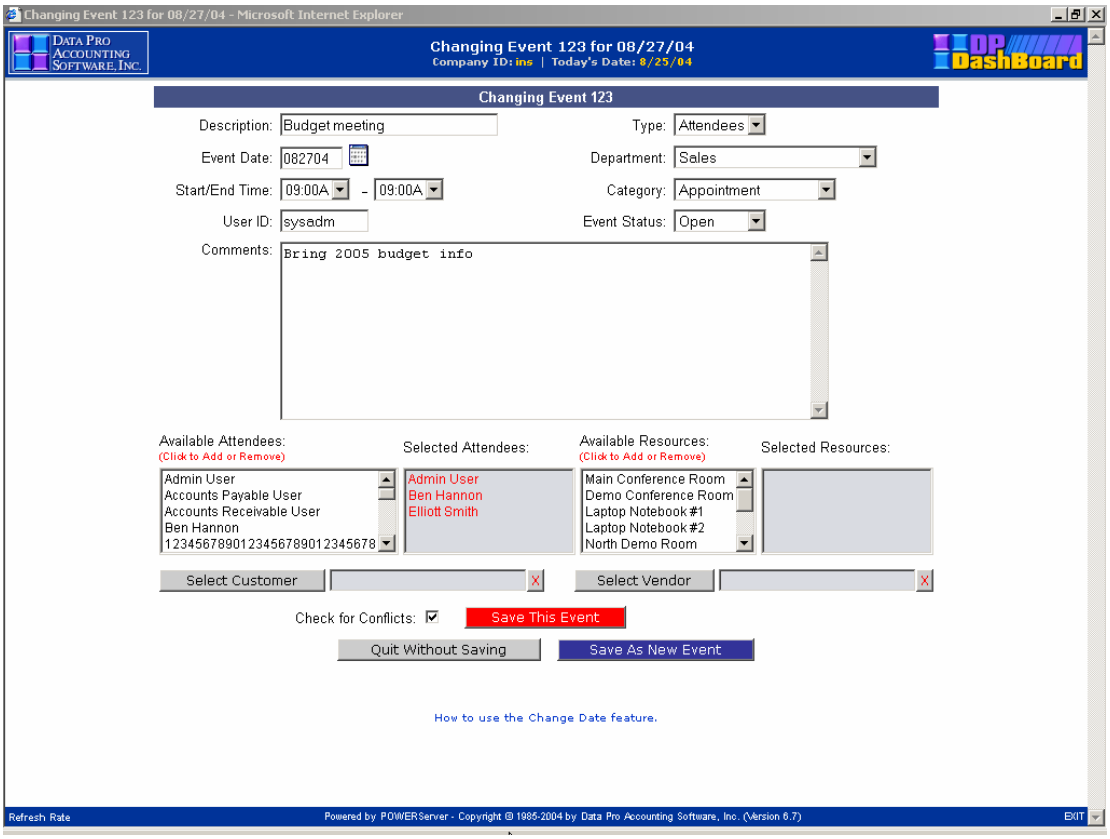


Figure 3-88. Changing Event Screen

3. Make any desired changes to the event (see To Add a New Event). <Click> the **Save This Event** button or **Save As New Event** button to save any changes. The Change Event screen closes and returns to the Calendar screen (Figure 3-80) displaying the modified event.

Project/Task Menu

This menu system option provides the capability to view tasks by category **(i.e. your personal tasks, tasks specific to a department, and all assigned tasks)**. You can also view tasks by project. When tasks are all completed for a project, the project as a whole can be marked as complete, and removed from the list of tasks. From the **Project/Task Menu** option, you can also add new tasks, review all task details, and open the **My Weekly Calendar and Worksheet** screen.

NOTE

If you have integrated the **DP/AUTO** product, the **"CalendarAlerts"** script will send an email notification of upcoming calendar events and the **"CalendarWorksheet"** script will email a daily worksheet of calendar events and pending tasks.

The following screen illustrates where the **Calendar & Tasks>Project/Task Menu** option (Figure 3-89) is located on the DP/DashBoard Menu System screen.

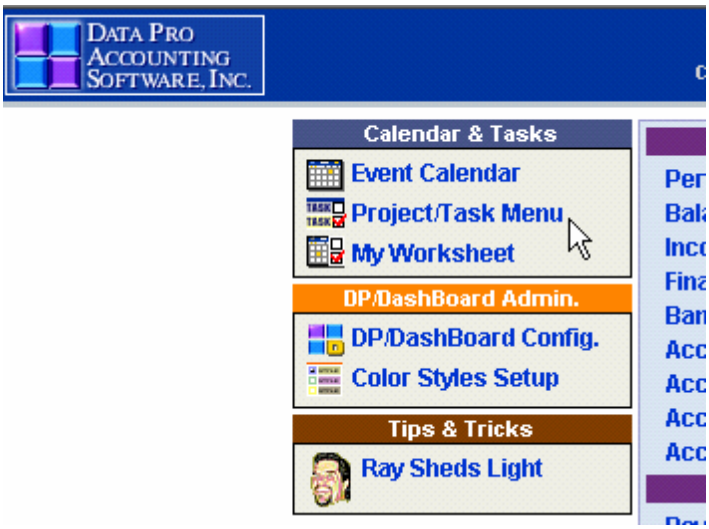


Figure 3-89. Calendar & Tasks>Project/Task Menu

To Access the Project/Task Menu Screen:

1. On the left side of the DP/DashBoard Menu System screen, select the **Project/Task Menu** option (Figure 3-89) from the Calendar & Tasks section. The Project/Task Menu screen (Figure 3-90) displays.

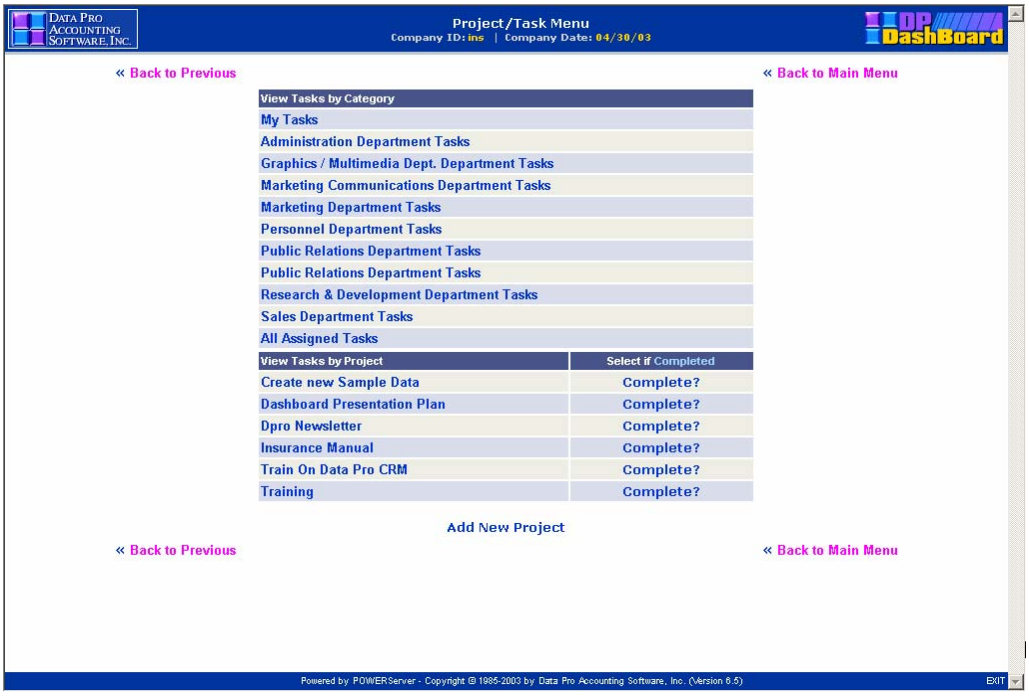


Figure 3-90. Project/Task Menu Screen

The following table describes the **Project/Task Menu** screen details.

View Tasks By Category	Lists all tasks entered from the Project/Task Manager by Category such as: My Tasks, Departments Tasks, and All Assigned Tasks.
View Tasks by Project	Lists all tasks by project headings.
Select if Completed	Selecting this option removes the task from Project/Task Menu screen.
Add New Project	Selection this option opens the Add New Project screen.

To Add a New Project:

This option allows you to add new projects to the **Project/Task Menu** function. When projects are added to the system, they can be associated to tasks when they are created. When a new project is added, it also displays in the **View Tasks by Project** section of the **Project/Task Menu** screen.

1. From the Project/Task Menu screen (Figure 3-90), <click> the **Add New Project** option. The Add New Project screen (Figure 3-91) displays.

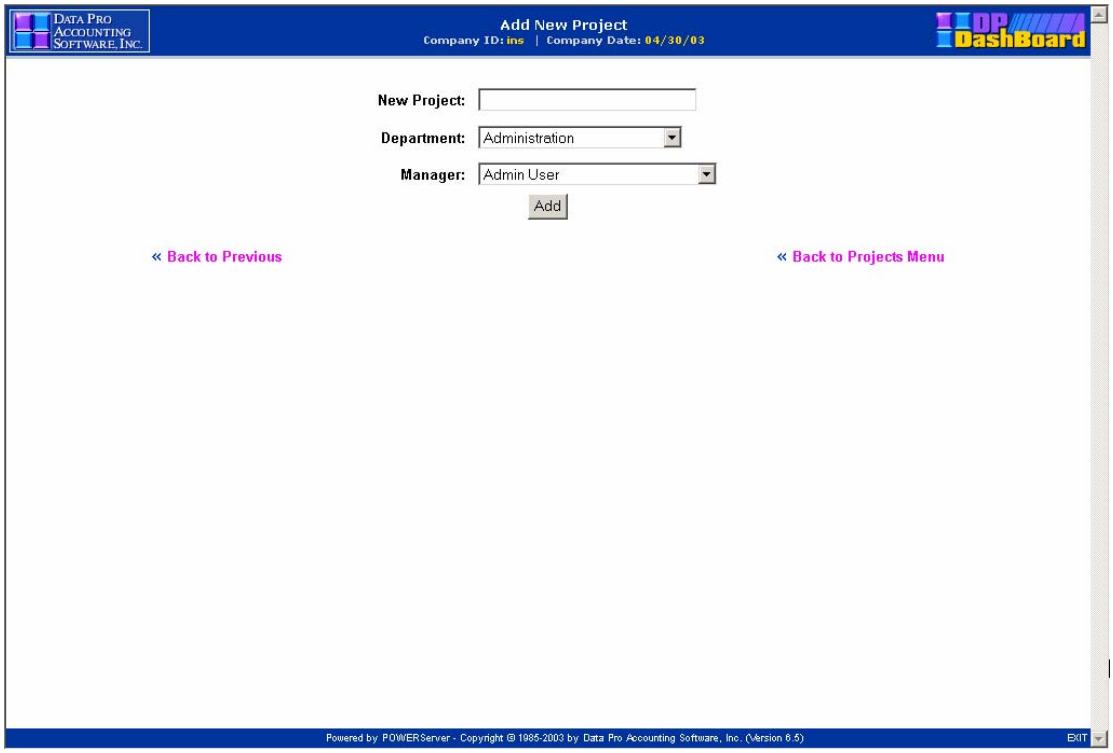


Figure 3-91. Add New Project Screen

2. Enter the name of the project in the **New Project** text box.
3. Select the department associated with the project from the **Department** pull-down menu.
4. Select the manager assigned to the project from the **Manager** pull-down menu.
5. <Click> the **Add** button. The Add New Project screen closes and returns to the Project/Task Menu screen. The new project is displayed in the View Tasks by Project Category section.

To Mark a Project as Completed:

This option allows you to mark a Project as complete. A project should only be marked complete if all the tasks related to that project are completed.

NOTE

Marking a project as complete removes the project from the Project/Task Menu screen.

1. From the Project/Task Menu screen, <click> the **Complete?** option (Figure 3-92) associated with the project you wish to mark as complete. A message displays confirming the selected project will be deleted from the system.

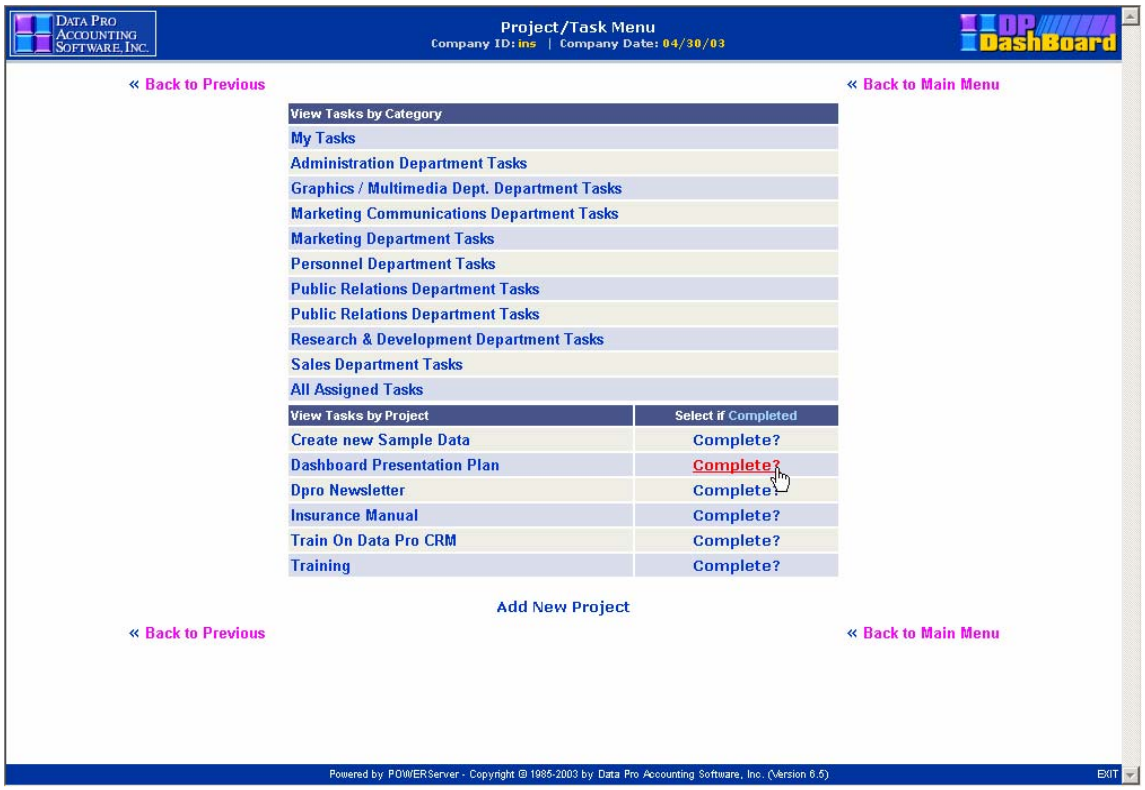


Figure 3-92. Project/Task Menu Screen – Mark Project Complete Function

2. Click the **OK** button. The project is now deleted from the Project/Task Menu screen and is no longer available as a project to associate with new tasks.

To View Tasks:

This option allows you to select a task by either category or by project name.

1. From the Project/Task Menu screen (Figure 3-90), select the desired category or project name from either the **View Tasks by Category** or **View Tasks by Project** sections of the screen. The Review Tasks screen (Figure 3-93) displays a listing of all tasks related to the selected category or project.

Figure 3-93. Review Tasks Screen

The following table describes the **Review Tasks** screen details.

Add New Task	Selecting this option opens the Add New Task screen.
Review All Task Detail	Selecting this option opens the Task Detail Report screen listing all details related to each task listed in the Review Tasks screen.
My Worksheet	Selecting this option opens the My Weekly Calendar and Task Worksheet screen. See the My Worksheet section.
Task #	Lists all tasks entered from the Project/Task Manager by Category such as: My Tasks, Departments Tasks, and All Assigned Tasks.
Priority	Specifies the priority assigned to the task when it was added to the system. Priorities can be set to: Urgent, High, Normal, Low, or New.
Department	Specifies the department assigned to the task.
Project	Name of the project the task is associated with. Assigned when a new task is added.
Description	Text Box. Enter a description of the task.
Assigned	Specifies whom the task is assigned to.
Type	Specifies the type of task. Types include: Assigned, Unassigned, Completed, and Private.
Status	Specifies the status of the project at the time it is added to the system. Status can be set to: New Task, In Progress, On Hold, or Completed.
Start Date	Lists the date the project commences.
End Date	Lists the date the project is expected to be completed.

2. <Click> the **Review All Task Detail** option to list all details for each task listed. The Task Detail Report screen displays listing details.

To Add a Task:

This option allows you to add a new task to your personal task list, or to a specific department. User permissions affect what tasks a user is able to view (i.e. Only users assigned to the Marketing Department can see tasks related to Marketing).

1. From the Review Tasks screen (Figure 3-93), click the **Add New Task** option. The Add/Change Task screen (Figure 3-94) displays.

Figure 3-94. Add/Change Task Screen

The following table describes the **Add/Change Task screen** details.

Assigned	Specifies whom the task is assigned to.
Priority	Specifies the priority assigned to the task when it was added to the system. Priorities can be set to: Urgent, High, Normal, Low, or New.
Project	Name of the project the task is associated with. Assigned when a new task is added.
Description	Text Box. Enter a description of the task.

Status	Specifies the status of the project at the time it is added to the system. Status can be set to: New Task, In Progress, On Hold, or Completed.
Type	Specifies the type of task. Types include: Assigned, Unassigned, Completed, and Private.
Start/End Date	Displays the selected date the project commences/ends.
Completion Date	Displays the date the task is completed. Entered at the end of the project.
Department	Specifies the department assigned to the task.
Details	Text box. Enter free form details about the task.
Comments	Text box. Enter any important comments about the task.
Save Task	Click this button to save the New Task selections. The new task displays in the **My Weekly Calendar & Task Worksheet**.
TIMESHEET SECTION	
Department	Select the department the employee is assigned.
Job	Select a job description from the pull-down menu if a job.
Cost Code	This data item will only be used if you selected "**Job"** as the Entry Type, described earlier. If this entry is to be applied to a Job Cost project/job, you must select a cost code for the system to use when your Time Sheet Entry is posted.
Bill Description	If the option to allow ***"Entry of JC/TB Transaction Description"*** is turned off in the Master Configuration, this data item will not be displayed. The transaction description will be passed to the Job Cost transaction file when you post the entry.
Hours Worked	Enter the number of hours worked for the specified employee.
From:/To:	If you have selected the option to enter hours as beginning and ending times, specify a time range. <Click> the Set Time button to calculate the number of total hours.

2. Select a user to assign to the task form the **Assigned** pull-down menu. Default is adminuser.
3. Select the priority of the task from the **Priority** pull-down menu. Default is Urgent.
4. Select the project associated with the task from the **Project** pull-down menu.
5. Enter a description of the task in the **Description** text box.
6. Select the project status from the **Status** pull-down menu. Default is New Task.
7. Select the task type from the **Type** pull-down menu. Default is Unassigned.
8. <Click> the calendar icons next to the **Start/End Date** display box to open the calendar and select the desired start/end dates for the task. The calendar closes and the selected start/end dated display. Hint: <Click> on **<<** to change the month or year prior to the current date, or <click> on **>>** to change the month or year after the current date.
9. Select the department associated with the task from the **Department** pull-down menu.
10. Enter specific information on the task in the **Details** text box.
11. Enter any necessary comments about the task in the **Comments** text box.
12. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the Review Tasks screen. The new task displays in the list of tasks.

To Change a Task:

This function allows you to edit a task entry from the Review Tasks screen. Changes made are immediately updated to the system.

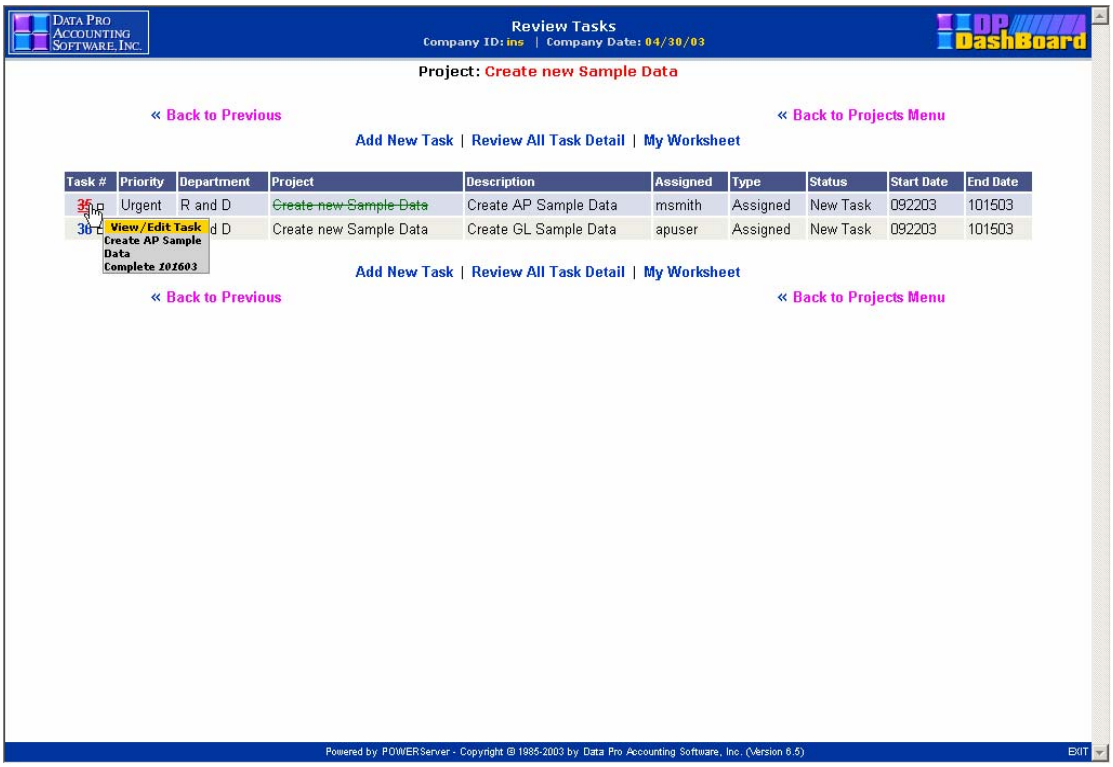


Figure 3-95. Review Tasks Screen – Change Task Function

1. From the Review Tasks screen, click the task number of the task you want to change in the **Task #** column (Figure 3-95). The Add/Change Task screen (Figure 3-94) displays listing all the tasks associated with the category or project.
2. Make any desired changes to the task.
3. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the Review Tasks screen. The list of tasks is updated with the changes.

To Mark a Task Complete:

1. From the Review Tasks screen (Figure 3-93), click the task number of the task you want to mark as complete from the **Task #** column. The Add/Change Task screen (Figure 3-94) displays.
2. <Click> the calendar icon next to the **Completion Date** display box to select the date the task is completed. Hint: <Click> on **<<** to change the month/year prior to the current date, or <click> **>>** to change the month/year after the current date.
3. <Click> the **Save Task** button. The calendar closes and returns to the Review Tasks screen. The task displays with a green line crossing though it to indicate it has been completed.

NOTE

This option can also be performed when adding a task for the first time (see the To Add a Task section).

To Remove a Task:

This option removes a selected task from the Review Tasks screen.

Figure 3-96. Review Tasks Screen – Remove Task Function

1. From the Review Tasks screen, <click> the ✕ in the **Task #** column for the task you want to remove (Figure 3-96). A dialog box displays confirming the intent to delete the specified task.
2. <Click> the **OK** button in the dialog box to delete the task and return to the Project/Tasks Menu screen (Figure 3-90).

OR

3. <Click> the **Cancel** button terminate the remove function. A dialog box displays, <click> the OK button to close the dialog box and return to the Review Tasks screen.

My Worksheet

This menu system option provides the capability to add, modify, and delete calendar events and add, modify, and remove tasks from your personal task list. User permissions determine what calendar events each user is allowed to view.

The following screen illustrates where the **Calendar & Tasks>My Worksheet** option (Figure 3-97) is located on the DP/DashBoard Menu System screen.

NOTE

With the integration of the event triggering system, **DP/Auto**, a daily notification of the calendar events and tasks assigned on the My Calendar Worksheet can be sent to specified e-mail addresses set up in **DP/Dashboard** by utilizing the "**calendarworksheet script**." See the ***DP/Auto User Manual*** for further details.

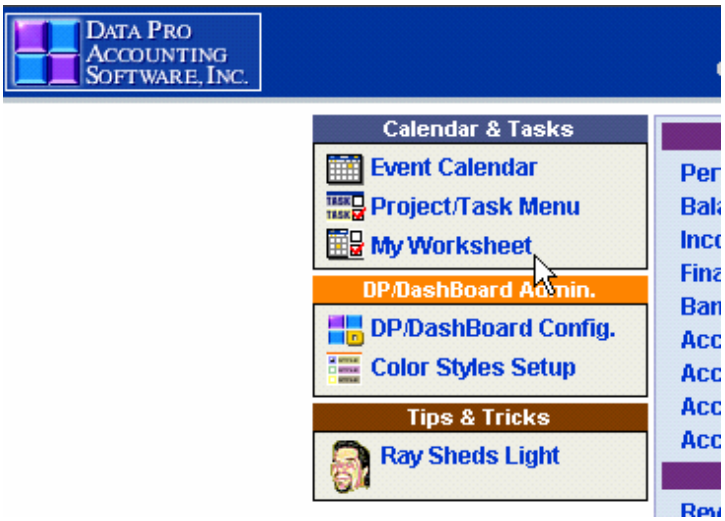


Figure 3-97. Calendar & Tasks>My Worksheet

To Access the My Worksheet Screen:

1. On the left side of the DP/DashBoard Menu System screen, select the **My Worksheet** option (Figure 3-97) from the Calendar & Tasks section. The My Weekly Calendar & Task Worksheet screen (Figure 3-98) displays.

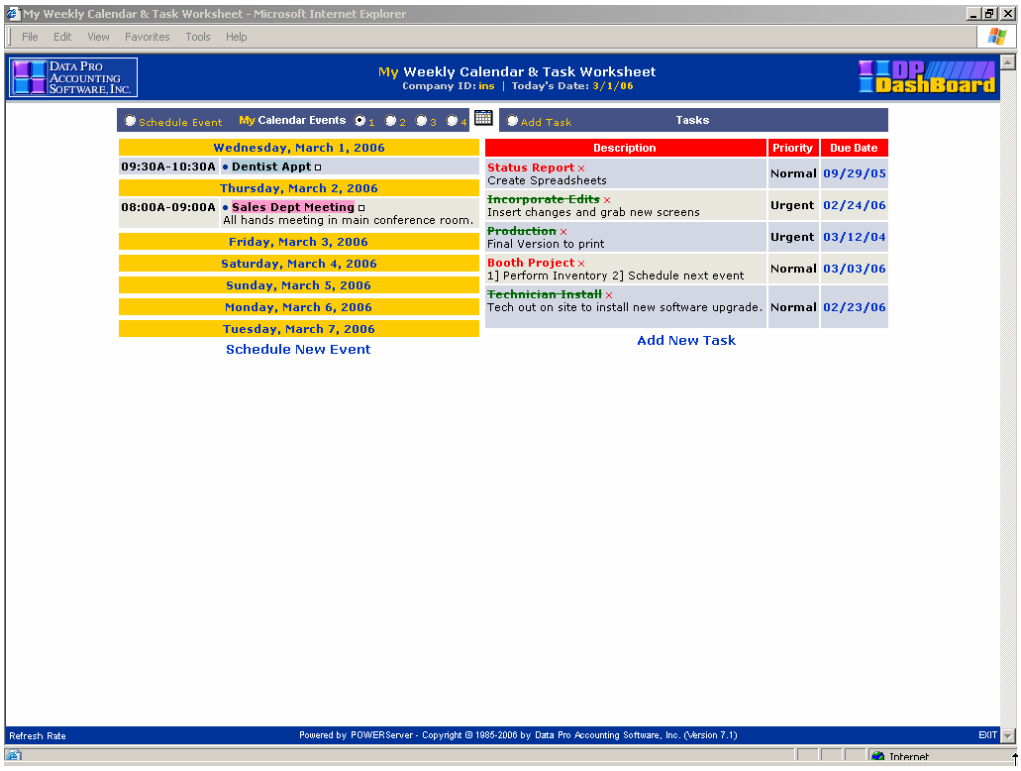


Figure 3-98. My Weekly Calendar & Task Worksheet Screen

The following table describes the My Weekly Calendar & Task Worksheet screen details.

Calendar Section	
Schedule Event	Selecting this radio button opens the Scheduling New Event window. This option allows you to add an event to either your personal Event Calendar or the Company Calendar.
(My/All) Calendar Events	Toggles between My or All Calendar Events. Displays all calendar events for 1-4 weeks. Calendar Events can be rearranged by selecting the black dot next to the event description and dragging it onto the desired date.
	Opens the Event Calendar. Default is the company calendar view.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add an event to either your personal Event Calendar or the Company Calendar.
	Selecting one of these radio buttons displays calendar events for one to four weeks from the current week.
Task Section	
Add Task	Selecting this radio button opens the Add/Change Task window. This option allows you to add personal tasks. These tasks also display in the appropriate sections of the Project/Task Menu screen.
Description	Column heading. Describes the task and details.
Priority	Column heading. Describes the priority set for the task.
Due Date	Displays the due date of the task. <Click> on an item in this column to add that task to the Event Calendar.
Add New Task	Selecting this option opens the Add/Change Task window. This option allows you to add personal tasks. These tasks also display in the appropriate sections of the Project/Task Menu screen.

To Schedule a New Calendar Event from the My Worksheet Option:

This function allows you to add a calendar event from the My Weekly Calendar & Task Worksheet screen (Figure 3-22). Scheduling a calendar event from this screen also updates the Calendar screen when viewed from the Event Calendar option from the Calendar & Tasks section of the DP/DashBoard Menu System screen.

1. From the My Weekly Calendar & Task Worksheet screen (Figure 3-98), <click> on the **Schedule Event** radio button or the Schedule New Event option at the bottom of the screen. The Scheduling New Event window (Figure 3-99) displays.

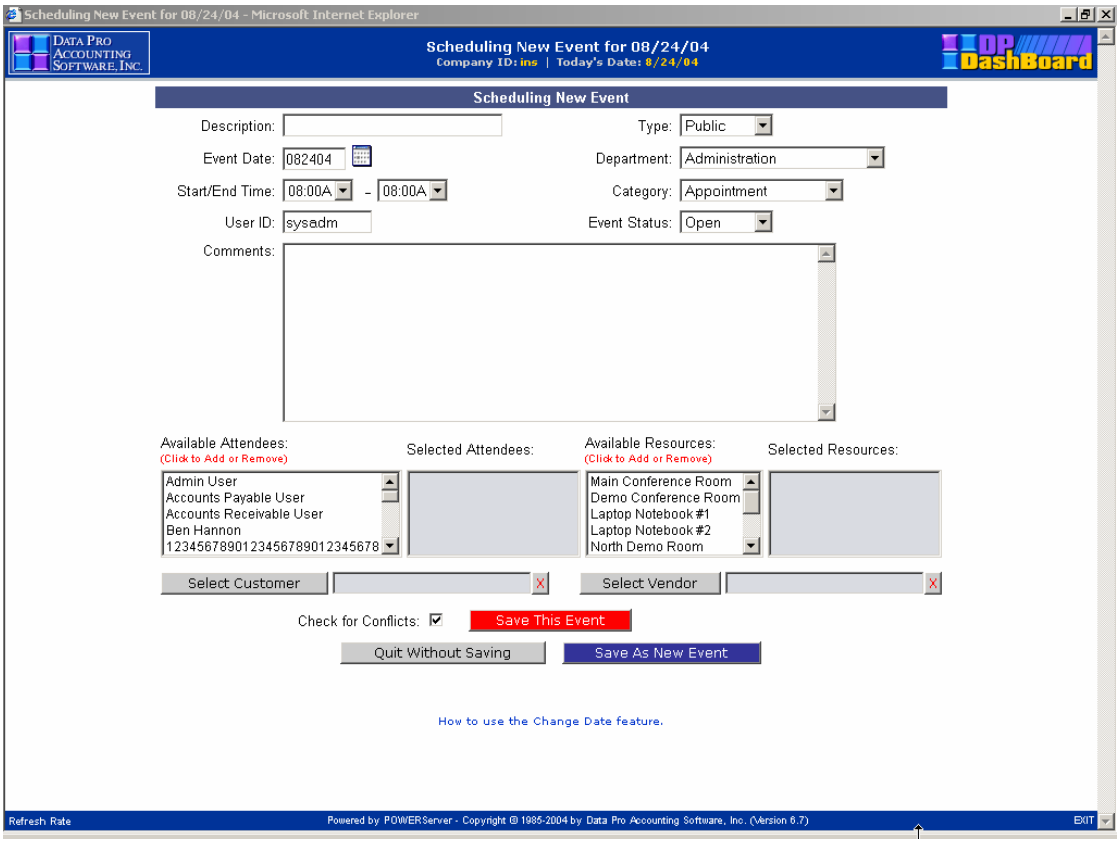


Figure 3-99. Scheduling New Event Window>My Worksheet Option

The following table describes the **Scheduling New Event** screen details.

Description	Text box. Enter a description of the new event (i.e. appointment, meeting, conference call, etc.).
Event Date	Display box. Click the calendar icon to select the date of the event. Defaults to the current date.
Start/End Time	Pull-down menus. Displays the start/end time of the event. Defaults to 8:00 am for both time options. Increments in five minute intervals.
User ID	Defaults to the User ID currently logged into the DP/DashBoard program.
Type	Pull-down menu. The following options describe the event type: Public – Event is open to anyone with access to the calendar. Depart Only – Event is to be viewed only by those who have access to a specified department. Attendees – Viewed only by selected attendees. Attendees receive an invitation to the event via email. Accepting the event will update the attendees' personal calendars. Private – Event can only be viewed by the user adding the event.
Department	Pull-down menu. Options describe the department the event is associated with. Defaults to the department the current user is associated with.

Category	Pull-down menu. Options describe the category of the event (e.g. appointment, meeting. phone call). Defaults to Appointment.
Event Status	Pull-down menu. Describes the status of the event (e.g. Open, Complete, Cancelled).
Comments	Text Box. Enter any specific details about the event.
Available Attendees	Scroll list displaying all possible people available to select to attend the event.
Selected Attendees	Display box listing the selected event attendees from the Available Attendees display box. Avoids conflicts.
Available Resources	Scroll list displaying all available resources that can be reserved for the event (e.g. conference rooms, equipment, etc.) Avoids conflicts.
Selected Resources	Display box listing the resources selected for reservation from the Available Resources display box.
Select Customer	Clicking on this option opens the Select Customer for this Event screen. You can select a customer to add to the event by searching by customer number or name. Customers selected will be sent an e-mail confirmation for the event. You can <click> on the selected customer's name in the text box to display the Customer Information window.
Select Vendor	Clicking on this option opens the Select Vendor for this Event screen. You can select a vendor to add to the event by searching by vendor number or name. Vendors selected will be sent an e-mail confirmation for the event.
Check for Conflicts	Check box. Selecting this option will check each attendee's personal calendars and selected resources for conflicts for the specified event date and time.
Save This Event	Clicking this button saves the event and adds it to the specified calendar. Those with permissions can only view the event.
Quit Without Saving	Clicking this button closes the Schedule New Event screen without saving and returns to the Calendar screen.
Save As New Event	Clicking this button will duplicate the current event and add it to the specified calendar event as a new event. All the original options (attendees, resources, location, etc) are retained. This is very useful if the date is the only item that is different for an event. Those with permissions can only view the event.

2. Enter a description of the event in the **Description** text box.
3. <Click> the calendar icon next to the **Event Date** display box to select the desired date for the event. Hint: <Click> on **<<** to change the month/year prior to the current date, or <click> **>>** to change the month/year after the current date. The calendar closes and the selected event date displays.
4. Selected the desired event options from the **Type, Department**, **Category**, and **Status** pull-down menus.
5. Enter a description of the event details in the **Comments** text box.
6. From the **Available Attendees** scroll list, click the desired attendees for the event. As attendees are selected, they are displayed in the Selected Attendees display box.
7. From the **Available Resources** scroll list, click the desired resources to be reserved for the event. As resources are selected, they are displayed in the Selected Resources display box.

8. If desired select a **Customer** or **Vendor** to add to the event. Customers and/or vendors selected will receive an e-mail confirmation of the event.

NOTE

If resources are selected for an event, and the event is saved, the administrator for each selected resource will receive an e-mail notification of the event and the resources to be reserved.

9. Select the **Check for Conflicts** check box to automatically verify all selected attendees are available during the selected date/time of the event.
10. Click the **Save This Event** button or **Save As New Event** button to save the event and update the calendar. The Schedule New Event screen closes and returns to the Calendar screen (Figure 3-80) displaying the new event.

NOTE

Remember, each time an event is scheduled or changed, all invited attendees receive an e-mail notice!

To Change a Calendar Event from the My Worksheet Option:

This function allows you to edit a calendar event from the My Weekly Calendar & Tasks Worksheet screen (Figure 3-100). Changes to calendar events listed from this screen are also updated in the Event Calendar.

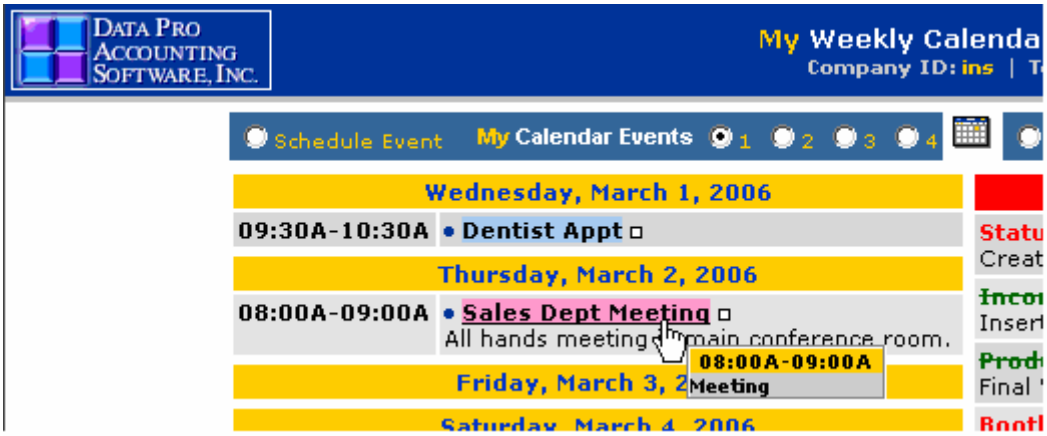


Figure 3-100. My Weekly Calendar & Task Worksheet Screen – Change Event Function

1. From the My Weekly Calendar & Task Worksheet screen, <click> the **event** to be changed from the list of calendar events (Figure 3-100). The Changing Event window displays (Figure 3-101).

NOTE

See To View Weekly Calendar Events from the My Worksheet Option for instructions on how to display calendar events.

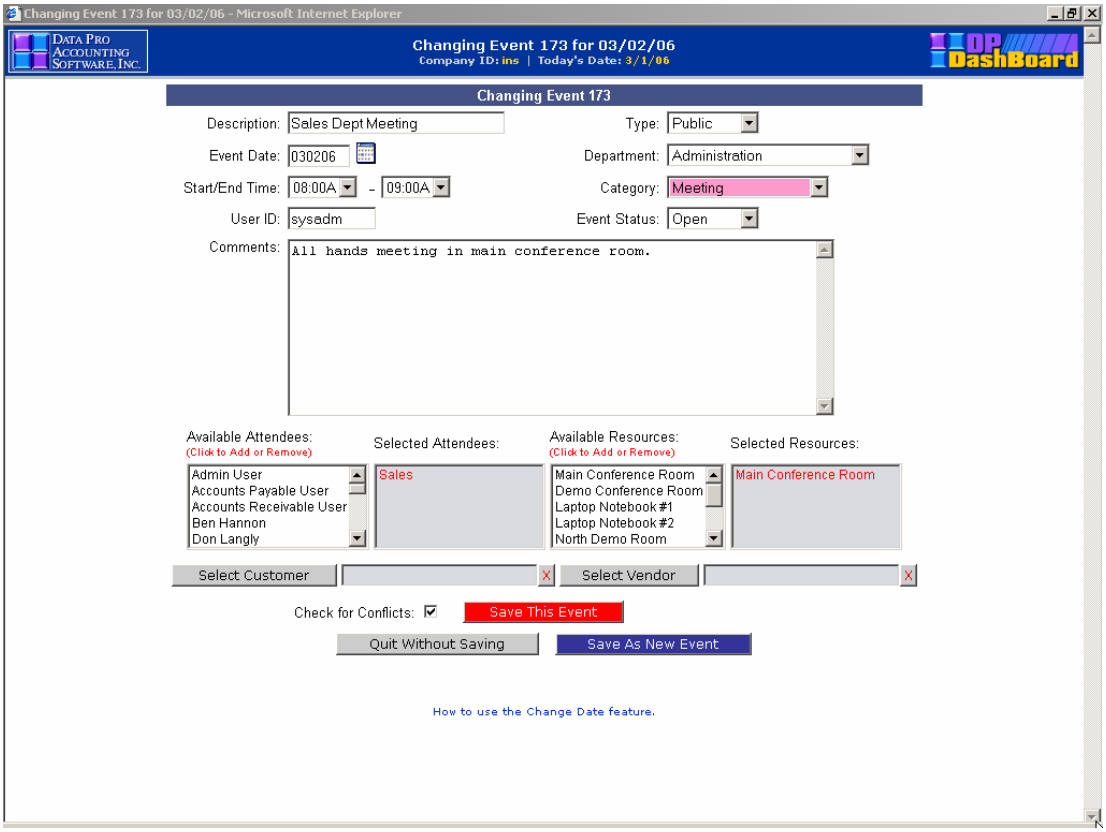


Figure 3-101. My Worksheet>Changing Event Window

2. Make any desired changes to the event (see the To Add a Calendar Event from the My Worksheet option for screen details).
3. <Click> the **Save This Event** button or **Save As New Event** button to save any changes. The Change Event screen closes and returns to the My Weekly Calendar & Task screen (Figure 3-100) displaying the modified event.

To Add a New Task from the My Worksheet Option:

1. From the My Weekly Calendar & Task Worksheet screen (Figure 3-98), <click> on the **Add Task** radio button or the **Add New Task** option at the bottom of the screen. The Add/Change Task window displays (Figure 3-102).

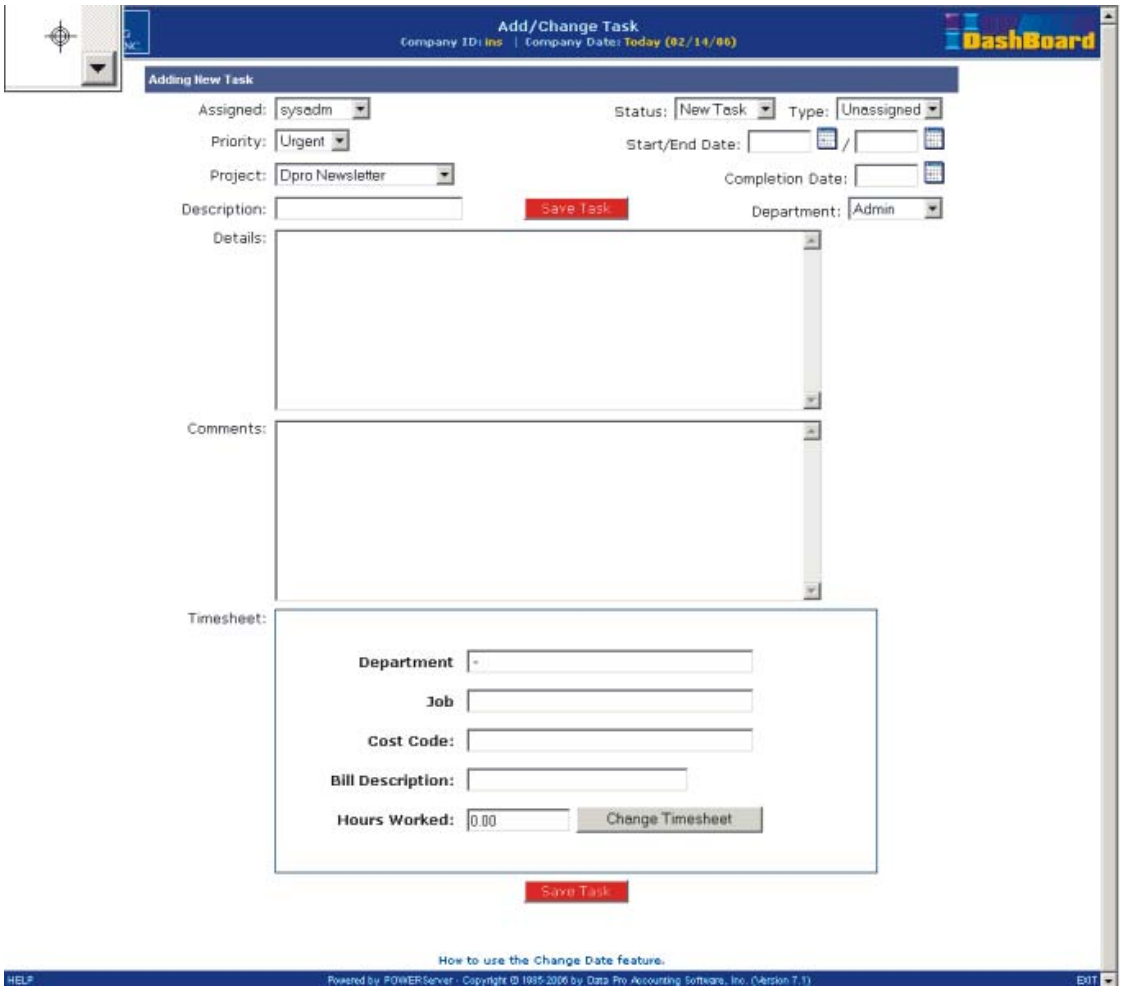


Figure 3-102. My Worksheet Add/Change Task Window

The following table describes the **Add/Change Task** window details.

Assigned	Specifies whom the task is assigned to.
Priority	Specifies the priority assigned to the task when it was added to the system. Priorities can be set to: Urgent, High, Normal, Low, or New.
Project	Name of the project the task is associated with. Assigned when a new task is added.
Description	Text Box. Enter a description of the task.
Status	Specifies the status of the project at the time it is added to the system. Status can be set to: New Task, In Progress, On Hold, or Completed.
Type	Specifies the type of task. Types include: Assigned, Unassigned, Completed, and Private.
Start/End Date	Displays the selected date the project commences/ends.
Completion Date	Displays the date the task is completed.
Department	Specifies the department assigned to the task.

Details	Text box. Enter details about the task.
Comments	Text box. Enter any important comments about the task.
Save Task	Click this button to save the New Task selections. The new task displays in the **My Weekly Calendar & Task Worksheet**.
TIMESHEET SECTION	
Department	Select the department the employee is assigned.
Job	Select a job description from the pull-down menu if a job.
Cost Code	This data item will only be used if you selected "**Job"** as the Entry Type, described earlier. If this entry is to be applied to a Job Cost project/job, you must select a cost code for the system to use when your Time Sheet Entry is posted.
Bill Description	If the option to allow ***"Entry of JC/TB Transaction Description"*** is turned off in the Master Configuration, this data item will not be displayed. The transaction description will be passed to the Job Cost transaction file when you post the entry.
Hours Worked	Enter the number of hours worked for the specified employee.
Change Timesheet	Click the **Change Timesheet** button to make any modifications to the current timesheet.

2. Select a user to assign to the task form the **Assigned** pull-down menu. Default is adminuser.
3. Select the priority of the task from the **Priority** pull-down menu. Default is Urgent.
4. Select the project associated with the task from the **Project** pull-down menu.
5. Enter a description of the task in the **Description** text box.
6. Select the project status from the **Status** pull-down menu. Default is New Task.
7. Select the task type from the **Type** pull-down menu. Default is Unassigned.
8. <Click> the icons next to the **Start/End Date** display box to open the calendar and select the desired start/end dates for the task. The calendar closes and the selected start/end dated display. Hint: <Click> on **<<** to change the month or year prior to the current date, or <click> on **>>** to change the month or year after the current date.
9. Select the department associated with the task from the **Department** pull-down menu.
10. Enter specific information on the task in the **Details** text box.
11. Enter any necessary comments about the task in the **Comments** text box.
12. <Click> the **Save Task** button. The Add/Change Task screen (Figure 3-94) closes and returns to the Review Tasks (Figure 3-93) screen. The new task displays in the list of tasks.

To Change a Task from the My Worksheet Option:

This function allows you to edit a task entry from the My Weekly Calendar & Tasks Worksheet screen (Figure 3-103). Changes to tasks listed from this screen are also updated in the Project/Task Menu Screen.

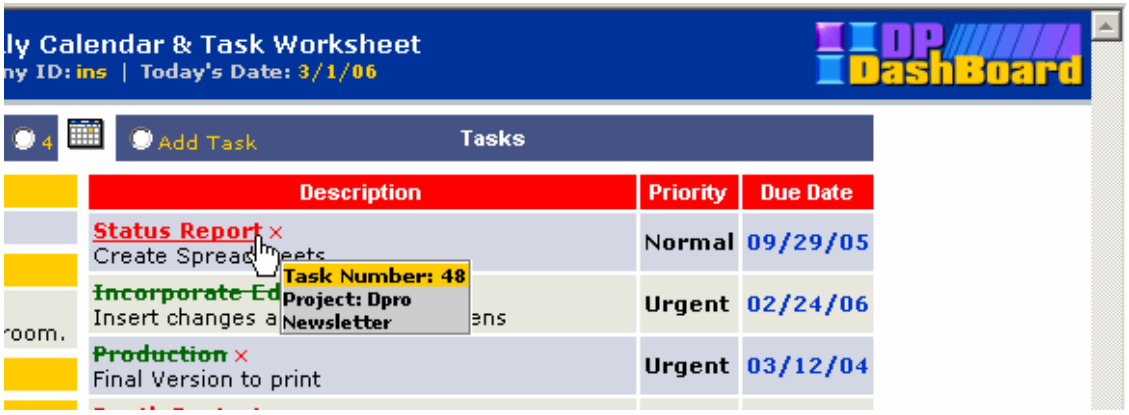


Figure 3-103. My Weekly Calendar & Task Worksheet Screen – Change Task Function

1. From the My Weekly Calendar & Task Worksheet screen, click the **task** you want to change in the Description column (Figure 3-103). The Add/Change Task window (Figure 3-102) displays.
2. Make any desired changes to the task.
3. <Click> the **Save Task** button. The Add/Change Task screen closes and returns to the My Weekly Calendar & Task Worksheet screen. The task is updated with the changes.

NOTE

<Click> on a task's due date to add that task to the Event Calendar.

To Mark a Task Complete from the My Worksheet Option:

1. From the My Weekly Calendar & Task Worksheet screen, click the task you want to change in the **Description** column (Figure 3-103). The Add/Change Task window (Figure 3-102) displays.
2. <Click> the icon next to the **Completion Date** display box to select the date the task is completed. Hint: <Click> on **<<** to change the month/year prior to the current date, or <click> **>>** to change the month/year after the current date.
3. <Click> the **Save** button. The calendar closes and returns to the Review Tasks screen. The task displays with a green line crossing though it to indicate it has been completed.

NOTE

This option can also be performed when adding a task for the first time (see the To Add a Task section).

To Remove a Task from the My Worksheet Option:

This function allows you to remove a task entry from the My Weekly Calendar & Tasks Worksheet screen (Figure 3-104). Changes to tasks listed from this screen are also updated in the Project/Task Menu Screen.

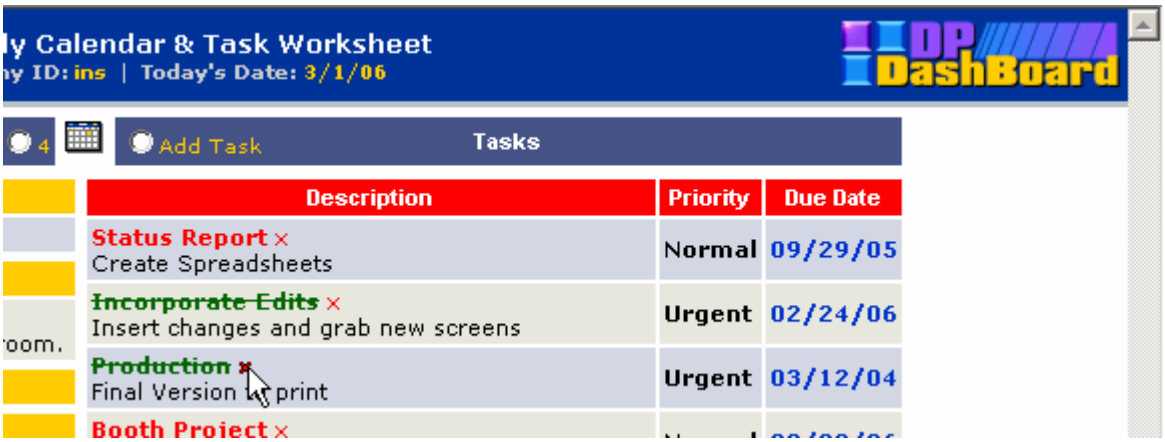


Figure 3-104. My Weekly Calendar & Task Worksheet Screen – Remove Task Function

1. From the My Weekly Calendar & Task Worksheet screen, <click> the × in the **Task #** column (Figure 3-104) for the task you want to remove. A dialog box displays confirming the intent to delete the specified task.
2. <Click> the **OK** button in the dialog box to delete the task and return to the Project/Tasks Menu screen (Figure 3-90).

OR

3. <Click> the **Cancel** button terminate the remove function. A dialog box displays, <click> the **OK** button to close the dialog box and return to the Review Tasks screen.

To View Weekly Calendar Events from the My Worksheet Option:

1. From the My Weekly Calendar & Task Worksheet screen (Figure 3-98), <click> on the **Calendar Events** toggle to select either My Calendar Events or All Calendar Events.
2. <Click> the **1**, **2**, **3**, or **4** radio button to display calendar events for the current week to four weeks ahead. The list of calendar events displayed expands depending on how many weeks are selected (Figure 3-105).

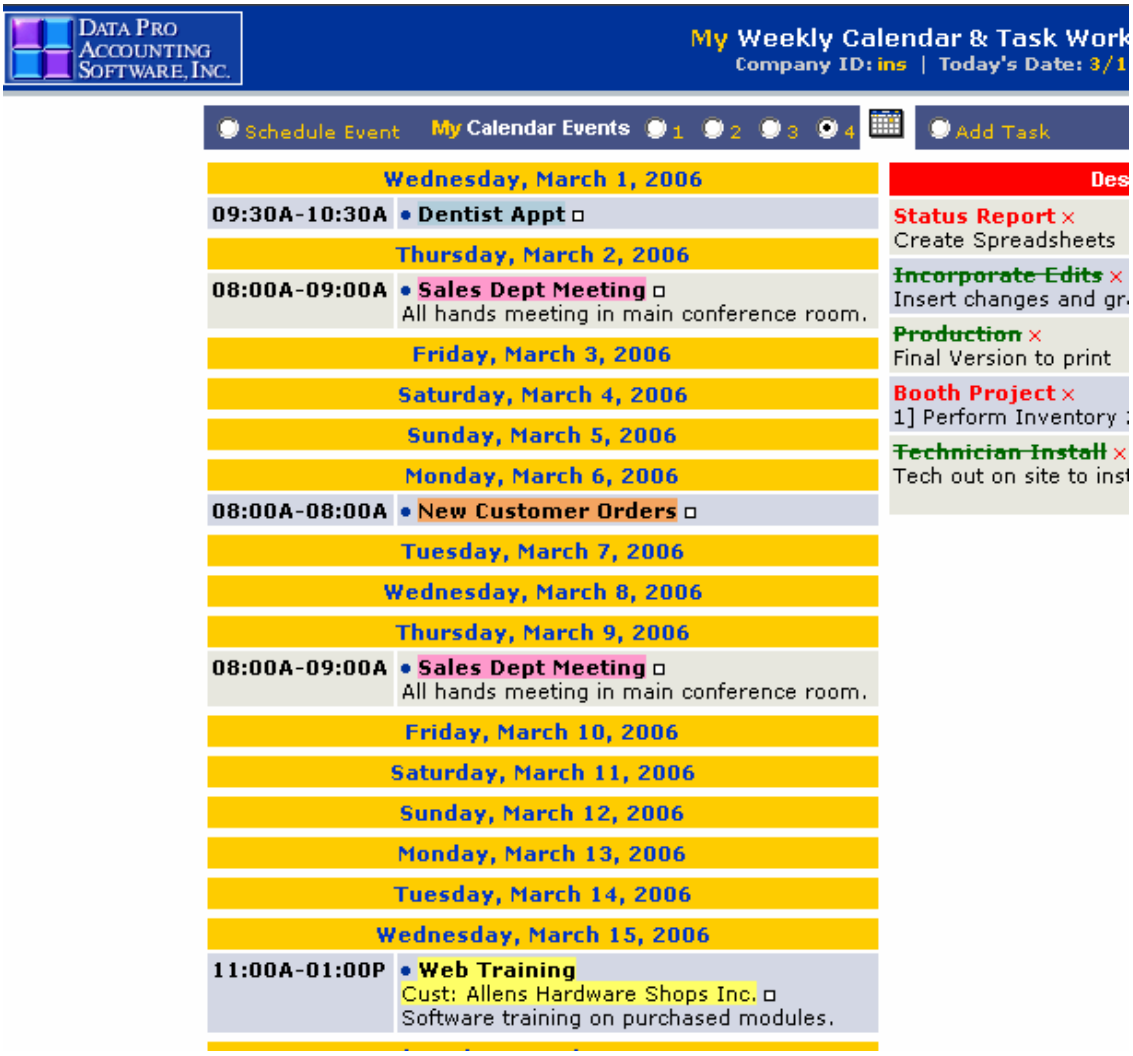


Figure 3-105. Calendar Events – Weekly View (example)

3. <Click> the icon at the top of the screen to open the Calendar screen (Figure 3-80). The calendar displays in the current month defaulting to the company calendar view (see the Event Calendar section for all functions related to this screen).

TIPS & TRICKS

Do you have a "**Jack of All Trades**" employee in your company or IT department? Well, we do and it's Ray! Ray is the guy that knows it all, can get it all, and helps all. When Ray gets around to it, he'll write documents such as troubleshooting suggestions, helpful hints, lessons learned, short cut functions, voice mail setup procedures, etc. The Tips & Tricks section of the DP/DashBoard Menu System screen is where various different helpful documents and links can be "**housed**" so that they are easily accessed, managed, and ready on demand. This option functions exactly like the Documentation section on the right side of the DP/DashBoard Menu System screen.

All these menu options are user-defined in the **DP/DashBoard Admin>DP/DashBoard Config** options. Titles, headings, images, and main menu icons can all be customized to what you want them to be. You can also limit who has the ability to view these documents (see the To Add a New Document section of the DP/DashBoard Admin>DP/DashBoard Config Options>Setup Ray Sheds Light section).

These features are accessible in the **Tips & Tricks** section of the DP/DashBoard Menu System screen (Figure 3-106).

Figure 3-106. Tips & Tricks Section>Ray Sheds Light

General Ray Sheds Light Functions

The following sections describe procedures on how to open documents from the DP/DashBoard Menu System screen, print documents on demand, and download documents. These procedures can be performed from the Ray Shed's Light screen under the Tips & Tricks section of the DP/DashBoard Menu System screen.

To Open a Ray Sheds Light Document or Link:

1. From the Ray Sheds Light screen, select the desired document or link from the **Documentation Description** column (Figure 3-107). The document /link opens in the appropriate associated program.

Figure 3-107. Ray Sheds Light – Open Document Function

NOTE

You must have the associated application loaded on your system in order for the document to open (i.e. if you are trying to open an *.xls* file, you need to have Microsoft Excel loaded on your system.)

To Print a Ray Sheds Light Document:

1. From the Ray Sheds Light screen, <right-click> the document you want to print from the **Document Description** column and select the **Print Target** option (Figure 3-108). The Print window displays.
2. Select the desired printer and <click> the **Print** button.

Figure 3-108. Ray Sheds Light – Print Function Example

To Download a Ray Sheds Light Document:

1. In the Ray Shed's Light screen, <right-click> the desired document to be downloaded (Figure 3-109) and select the **Save Target As** option. The Save As window (Figure 3-110) displays.

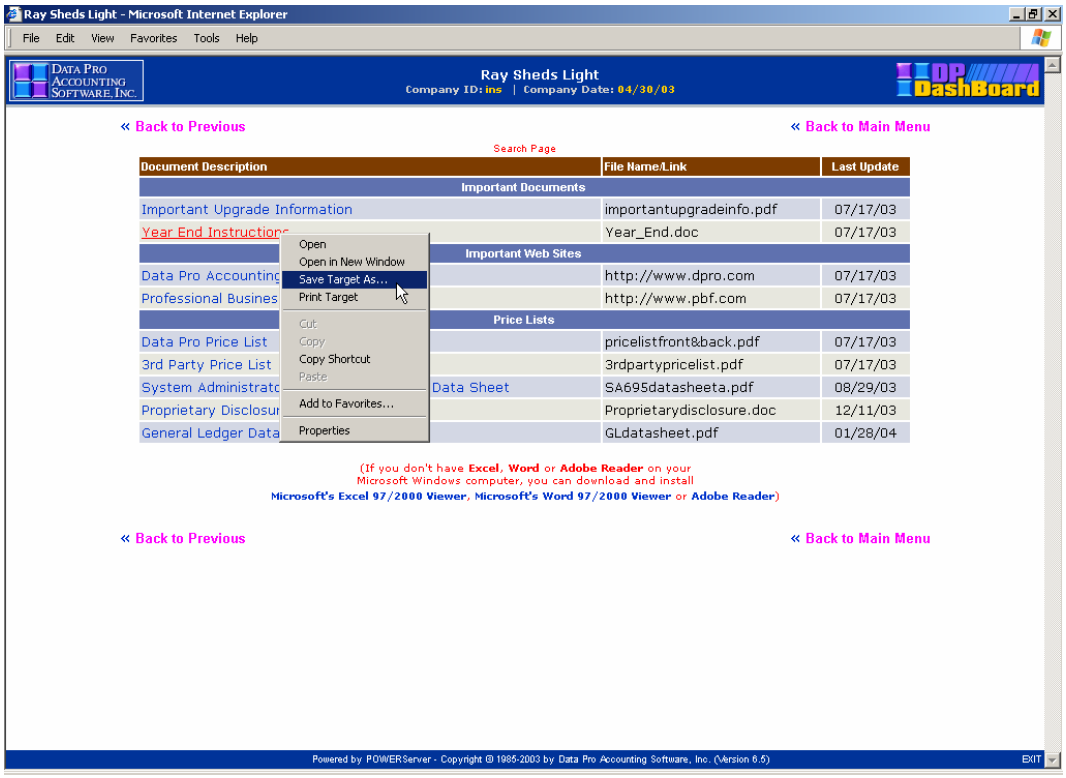


Figure 3-109. Setup Ray Sheds Light- Download Document Function

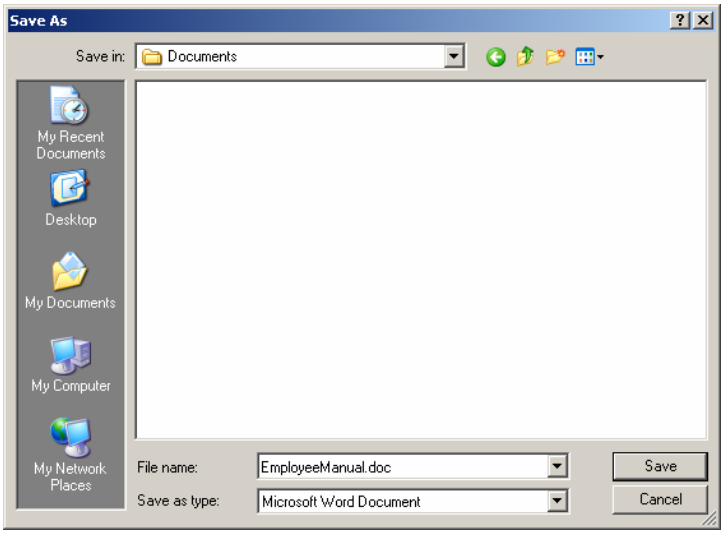


Figure 3-110. Save As Window

2. Select the desired directory to download the file into from the **Save In** pull-down menu.
3. If desired, rename the document in the **File Name** pull-down menu.
4. If appropriate, change the file type in the **Save as type** pull-down menu.
5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

REPORTS AND DRILLDOWNS

The Reports and Drilldown menu options from the DP/DashBoard Menu System screen, allow you to access Report functions and Drilldown capabilities, based on the **Infinity POWER** accounting modules installed. You must have the following Infinity POWER modules installed for all DP/DashBoard features to be accessible: General Ledger **(GL**), Accounts Payable (**AP**), Accounts Received (**AR**), Check Reconciliation (**CR**), and Customer Support Management (**SD**).

NOTE

If these modules are not installed, these features will not be available in the DP/DashBoard application. Although the Customer Support Management Module is included in the purchase price of DP/DashBoard, it does require the additional purchase of the A/R module to take full advantage of this system.

The special reporting features are accessible in the **Reports & Drilldowns** section of the DP/DashBoard Menu System screen (Figure 3-111).

Figure 3-111. Reports and Drilldowns Main Menu Options

Perform General Ledger Company Consolidation

This option allows you to combine several companies, at varying percentages of ownership, into one Consolidation Entity so that you can run various reports. For example, your company purchases **35%** of another company. You will be maintaining the records of this subsidiary as well as your parent company. In order to give a complete financial picture to your Board of Directors, the subsidiary's financial statements must be combined with the parent company's financial statements. Simply set up a consolidation entity in the Windows GUI, Windows character-based, or SCO UNIX/LINUX version of the **Infinity POWER G/L** module first, which will consolidate **100%** of the parent company's financial statements with **35%** of the subsidiary's.

Keep in mind that all companies that are being consolidated must have the same Month of Year End and consistent Chart of Accounts. Otherwise, this could cause information to be distorted or be inaccurate.

NOTE

The Consolidation Entity must already be set up in the Infinity POWER General Ledger application to perform this option.

The following screen illustrates where the **Reports & Drilldowns>Perform General Ledger Company Consolidation** option (Figure 3-112) is located on the DP/DashBoard Menu System screen.

Figure 3-112. Reports & Drilldowns>Perform General Ledger Company Consolidation

To Consolidate an Entity:

1. In the center of the DP/DashBoard Menu System screen System Window, select the **Perform General Ledger Company Consolidation** option from the Reports & Drilldowns section. The Perform General Ledger Consolidation screen displays (Figure 113).

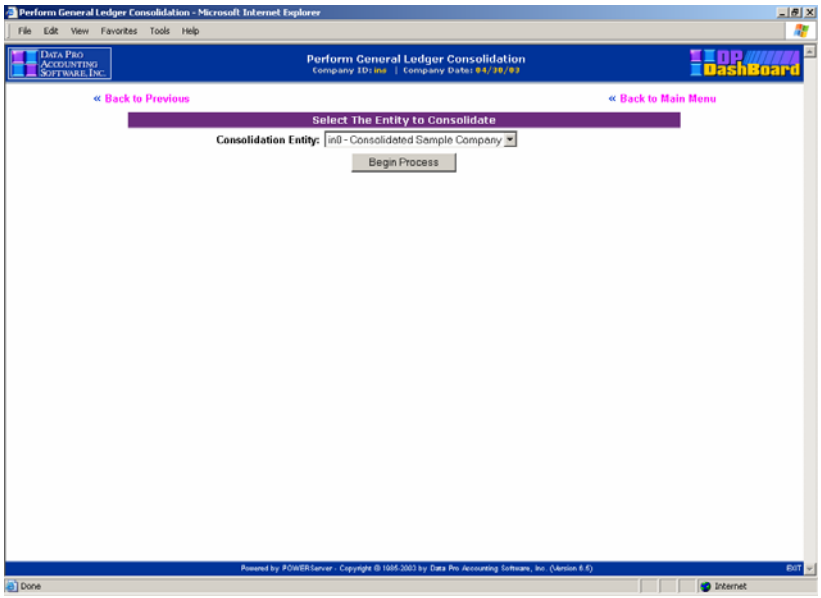


Figure 113. Perform General Ledger Consolidation Screen

2. Select the desired company from the **Consolidation Entity:** pull-down menu. Since there can be a wide variety of choices, this is a pull-down menu list.

3. <Click> the **Begin Process** button. This process may take several minutes and the screen may clear while the program is performing the consolidation. When the consolidation is finished, a message displays confirming the consolidation is complete. The system displays when each company is processed.

NOTE

If a company is not found, a message displays indicating that this company is not included in the consolidation.

4. <Click> the **Return to Menu** option. The screen closes and returns to the DP/DashBoard Menu System screen.

Balance Sheet

This option prints a Balance Sheet in the format specified in the **Setup Financial Statements** option in the Infinity POWER General Ledger (G/L) module. The Balance Sheet is a statement of your company's financial position, a snapshot of your business at a given moment in time. It lists your assets, your liabilities, and the difference between the two, which is your net worth. The accounting equation (assets = liabilities + owner's equity) is the basis for the Balance Sheet.

The Balance Sheet is typically printed after all adjusting entries made in the general journal entries have been posted to the general ledger, accounts have been footed to arrive at the period end totals, and an adjusted trial balance is prepared from the general ledger amounts. However, it can also be used as an on-going daily barometer for current cash balances and much more.

Once all information is posted to the General Ledger, the data is immediately available for printing all financial reports (such as the Balance Sheet).

The following screen illustrates where the **Reports & Drilldowns>Balance Sheet** option is located on the DP/DashBoard Menu System screen (Figure 3-114).

Figure 3-114. Reports & Drilldowns>Balance Sheet

To Display a Balance Sheet Report:

1. In the center of the DP/DashBoard Menu System screen System screen, select the **Balance Sheet** option from the Reports & Drilldowns section. The Balance Sheet Reports screen displays (Figure 3-115).

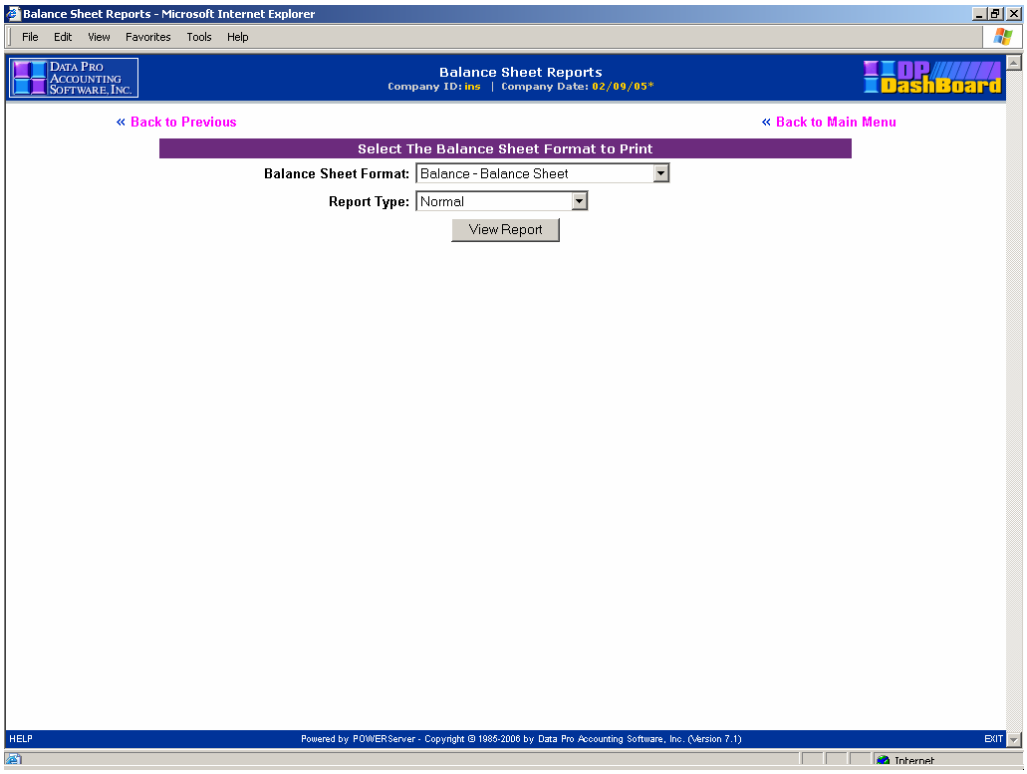


Figure 3-115. Balance Sheet Reports Screen

Balance Sheet report formats available are:

Normal	Prints a Balance Sheet in standard format (two pages). The exact way the report is presented and printed is controlled entirely by the user in setting up Financial Statement Maintenance in the Infinity POWER General Ledger module. This normally includes Asset accounts on page one of the report and all Liabilities and Owner's Equity accounts on page two.
Budget Comparison	Prints a Balance Sheet that includes any budgeted numbers setup in the SetUp Accounts option when configuring your Chart of Accounts or the option to setup or enter change budgets**,** in the Infinity POWER GL module. The report will compare the budgeted numbers against the actual and print any variance between the two numbers. Any over budget amounts will appear as a positive number; under-budget as a negative number.
Comparative Year	Prints a Balance Sheet with two printed columns of information. The first column reflects the current year's information as of the system date. This information is identical to printing the normal Balance Sheet. The second column reflects the prior year's information configured in the Set Up Accounts option in the Infinity POWER GL module.

Comparative Month/Year	Prints a Balance Sheet that compares the current month's actual account balances with both the prior month's actual account balances and the prior year's actual account balances for the same month.
6 Month Trend	Prints a Balance Sheet that compares the current month's actual account balances with the previous five **(5)** month's actual account balances, even if the previous months occurred in a prior year. To run this version of the report, you must have data files in the prior year, if the date range selected crosses back into a prior year. Otherwise, a warning displays and the report will not run. If you do not desire to create prior year's data files, simply run the report with the system date set to the sixth fiscal period of the year or higher.

2. Select the desired Balance Sheet from the **Balance Sheet Format:** pull-down menu.
3. Select the desired report type from the **Report Type:** pull-down menu. The report type options are pre-defined based on the configuration defined in the Infinity POWER General Ledger module.
4. <Click> the **View Report** button. The Balance Sheet Report screen (Figure 3-116) displays containing the specified report information.

NOTE

The Run Date and Time information appearing at the top half of the report may be turned ON or OFF in the master configuration.

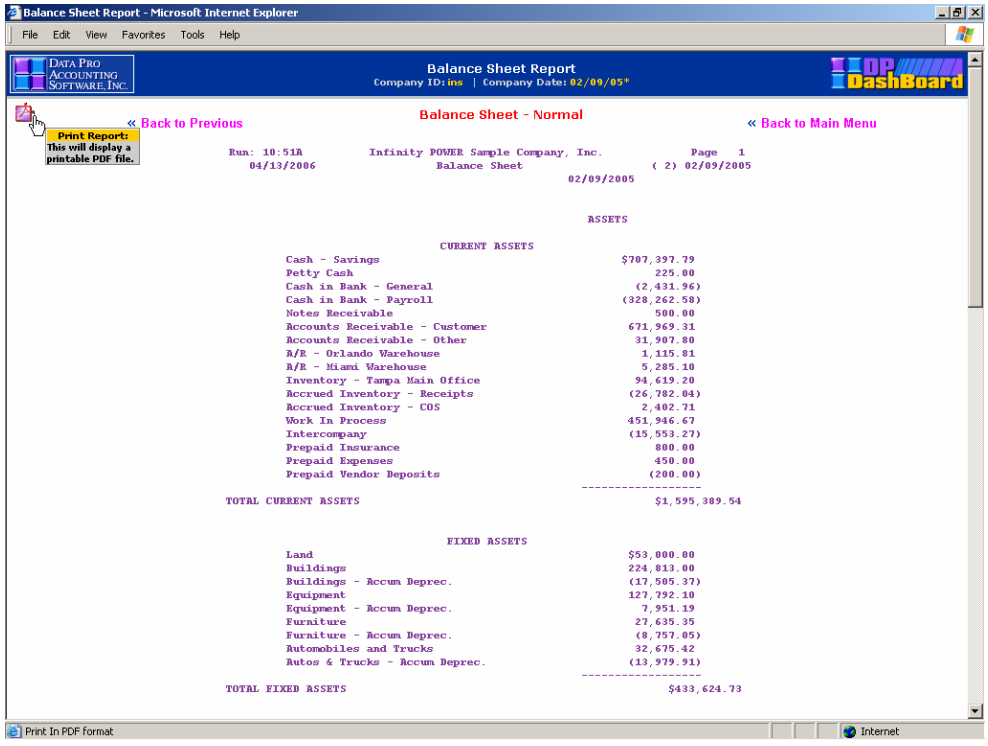


Figure 3-116. Balance Sheet Report Screen – Normal (Example)

NOTE

<Click> on the PDF icon in the top left of the report to display a printable PDF version of the report.

5. <Click> the **<<Back to Previous** option to request another report or the **<<Back to Main Menu** option to return to the DP/DashBoard Menu System screen.

Income Statement

This option prints an Income Statement in the format specified in the **Setup Financial Statements** option in the Infinity POWER General Ledger module **(i.e. normal, budget- comparison, comparative year, comparative month/year, 6 month trend, etc.)**.

The Income Statement is one of the key financial reports utilized by a business. It lists your income, expenses, and net income (loss). Your business' tax return will use a variation of the Income Statement to determine your potentially taxable income.

The Income Statement is typically prepared after all adjusting entries are made in the general journal, all journal entries have been posted to the general ledger, the general ledger accounts have been footed to arrive at the period end totals, and an adjusted trial balance has been prepared from the general ledger totals. Once all information is posted to the General Ledger, the data is immediately available for printing financial reports (such as the Income Statement). It may be printed on demand throughout the month to monitor a company's sales progress.

The following screens illustrate the **Reports & Drilldowns>Income Statement** option located on the DP/DashBoard Menu System screen (Figure 3-117).

Figure 3-117. Reports & Drilldowns>Income Statement

To Display an Income Statement:

1. In the center of the DP/DashBoard Menu System screen, select the **Income Statement** option from the Reports & Drilldowns section. The Income Statement Reports screen displays (Figure 3-118).

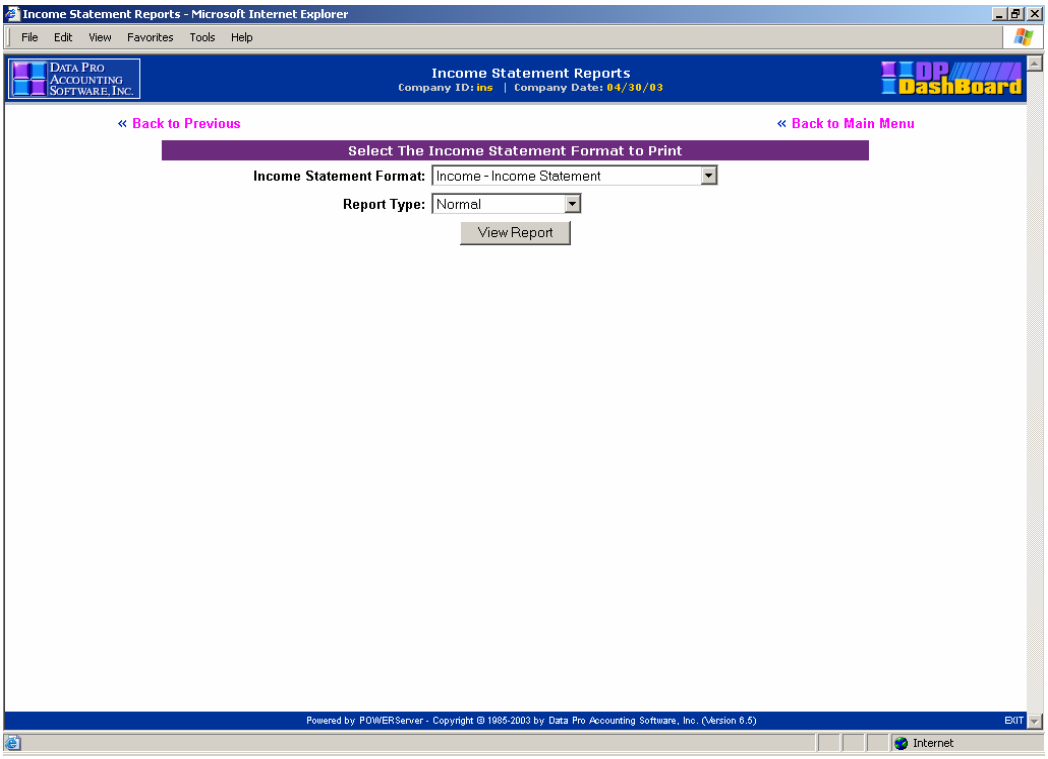


Figure 3-118. Income Statement Reports Screen

Income Statement report formats available are:

Normal	Prints an Income Statement in standard format (two pages). The exact way the report is presented and printed is controlled entirely by the user in setting up Financial Statement Maintenance in the Infinity POWER General Ledger module.
Budget Comparison	Prints an Income Statement that includes any budgeted numbers setup in the SetUp Accounts option when configuring your Chart of Accounts or the option to setup or enter change budgets**,** in the Infinity POWER GL module. The report will compare the budgeted numbers against the actual and print any variance between the two numbers. Any over budget amounts will appear as a positive number; under-budget as negative numbers.
Comparative Year	Prints an Income Statement with two printed columns of information. The first column reflects the current year's information as of the system date. This information is identical to printing the normal Balance Sheet. The second column reflects the prior year's information configured in the Set Up Accounts option in the Infinity POWER GL module.
Comparative Month/Year	Prints an Income Statement that compares the current month's actual account balances with both the prior month's actual account balances and the prior year's actual account balances for the same month.

6 Month Trend	Prints an Income Statement that compares the current month's actual account balances with the previous five **(5)** month's actual account balances, even if the previous months occurred in a prior year. To run this version of the report, you must have data files in the prior year, if the date range selected crosses back into a prior year. Otherwise, a warming displays warning and the report will not run. If you do not desire to create prior year's data files, simply run the report with the system date set to the sixth fiscal period of the year or higher.
Quarterly Statement	Prints an Income Statement providing quarter-to-date and year-to-date figures, useful for estimating tax liability. If you are using **13 Period** processing, this report will not print. The **"Year-to-Date Only"** report provides year to date only statements, beneficial for preparing the IRS statement at year-end without showing all of the last month's adjustments and depreciation entries.
Year-To-Date Only	Print an Income Report providing the year-to-date figures only. No monthly totals will appear.
Annual Budget	Prints an Income Statement providing the current period actual, the Year-to-Date actual, the annual budget, the portion of the remaining budget that is left for the year, and their respective percentages. This is an ideal report for telling management where they stand relative to the point in time within a fiscal year.

2. Select the desired Income Statement form from the **Income Statement Format** pull-down menu.
3. Select the desired report type from the **Report Type** pull-down menu. The report type options are pre-defined based on the configuration defined in the Infinity POWER General Ledger module.
4. <Click> the **View Report** button. The Income Statement Report screen displays the requested report information (Figure 3-119).

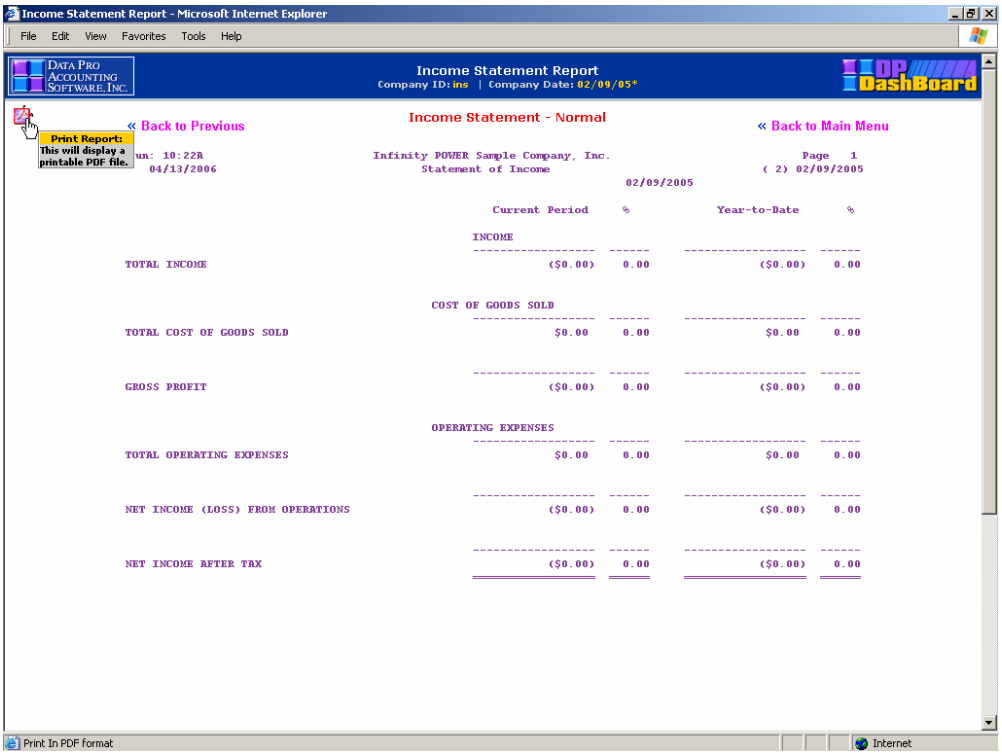


Figure 3-119. Income Statement Report Screen –Normal (Example)

NOTE

<Click> on the PDF icon in the top left of the report to display a printable PDF version of the report.

5. <Click> the **<<Back to Previous** option to request another report or the **<<Back to Main Menu** option to return to the DP/DashBoard Menu System screen.

Financial Statement Drilldown

This option displays financial statements in Balance Sheet, Income Statement, and Cashflow report formats. The drilldown capability allows you to select individual components on each report to get specific financial data on those selected items **(i.e. Balance Sheet>Current Assets>Y-T-D Amount)**. The Drilldown function provides the capability to tailor financial statements to display only the content you are interested in viewing.

The following screen illustrates where the **Reports & Drilldowns>Financial Statement Drilldown** option is located on the DP/DashBoard Menu System screen (Figure 3-120).

Figure 3-120. Reports & Drilldowns>Income Statement

To Access the Financial Statement Drilldown Option:

1. In the center of the DP/DashBoard Menu System screen System screen, select the **Financial Statement Drilldown** option from the Reports & Drilldowns section. The Financial Statements Drilldown Reports screen displays (Figure 3-121).

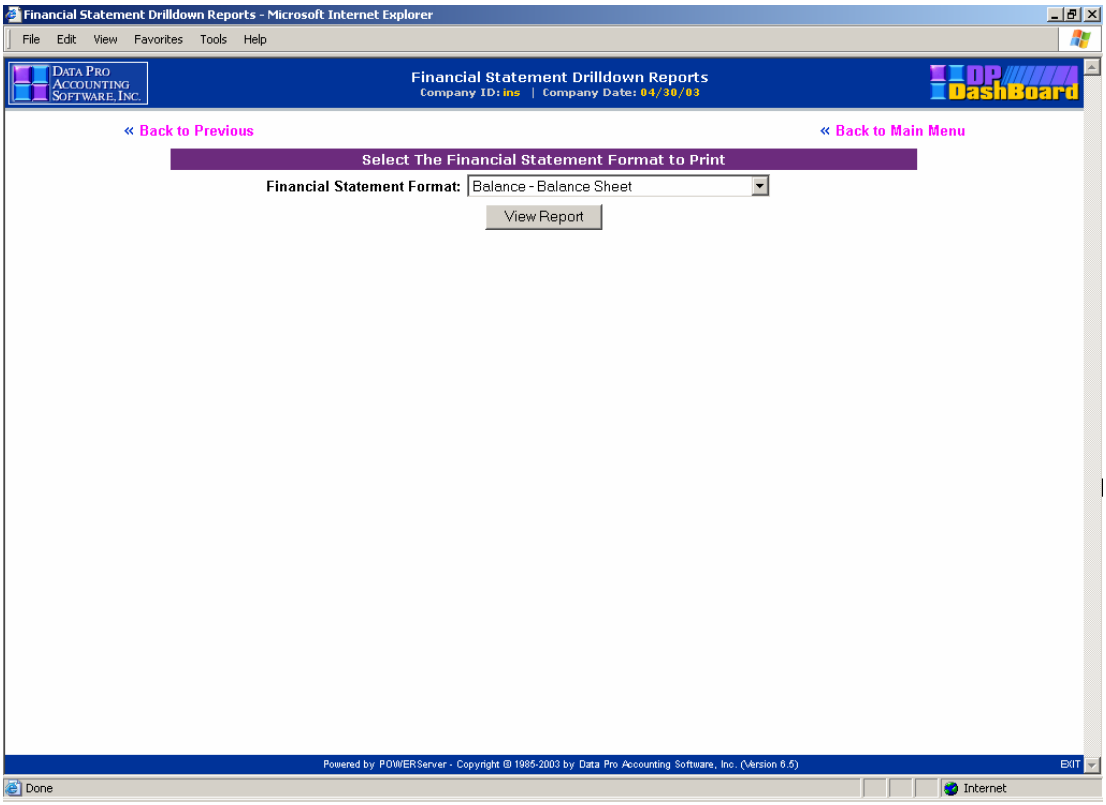


Figure 3-121. Financial Statement Drilldown Reports Screen

NOTE

Financial Statement formats available are solely based on the number of financial statement formats you have defined for each company.

Balance Sheet

This Financial Statement Drilldown option displays a financial report in Balance Sheet format, providing the month-to-date (M-T-D) and year-to-date (Y-T-D) balances for the following Balance Sheet components: Current Assets, Fixed Assets, Other Assets, Current Liabilities, Long Term Liability, Stockholder Equity, and Current Period Profit (Loss).

To Display a Balance Sheet:

1. From the Financial Statement Drilldown Reports Screen, select one of the formats defined in your system. In the INS Sample Co. this would appear as **Balance – Balance Sheet** or **Balance2 – Balance Sheet – Bank Copy**, in the Financial Statement Format pull-down menu. The appropriate Balance Sheet report displays (Figure 3-122).

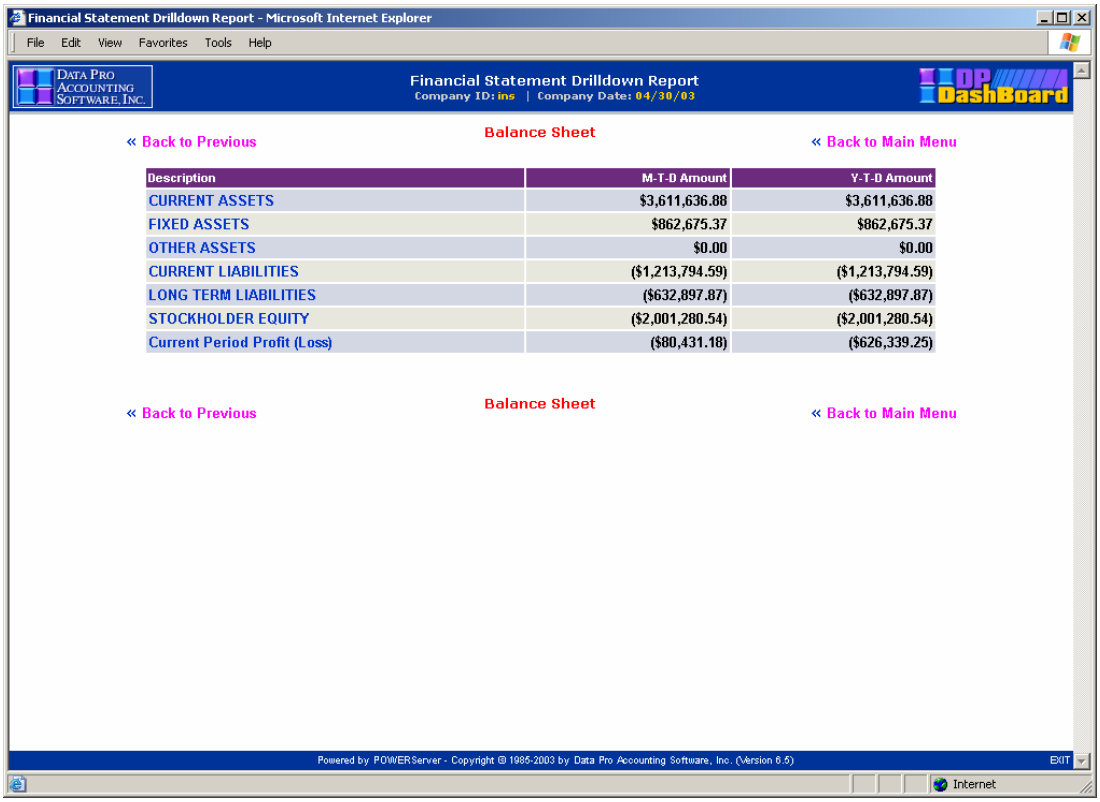


Figure 3-122. Balance Sheet Report

To Drilldown a Balance Sheet Report:

1. <Click> a component in the **Description** column of the Balance Sheet report to drilldown and display the next report level ***(i.e. Current Assets)*** (Figure 3-123). The Financial Statement Drilldown Report screen displays (Figure 3-124) containing the M-T-D and Y-T-D balances for the selected component.

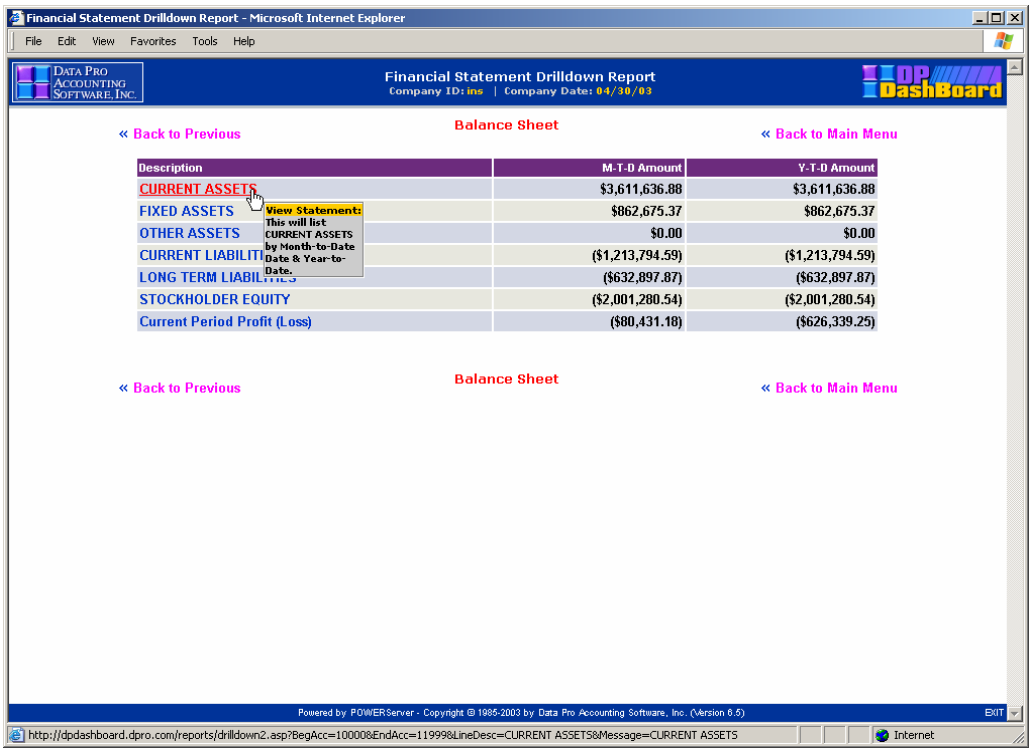


Figure 3-123. Financial Statement Drilldown>Balance Sheet>Current Assets (Example)

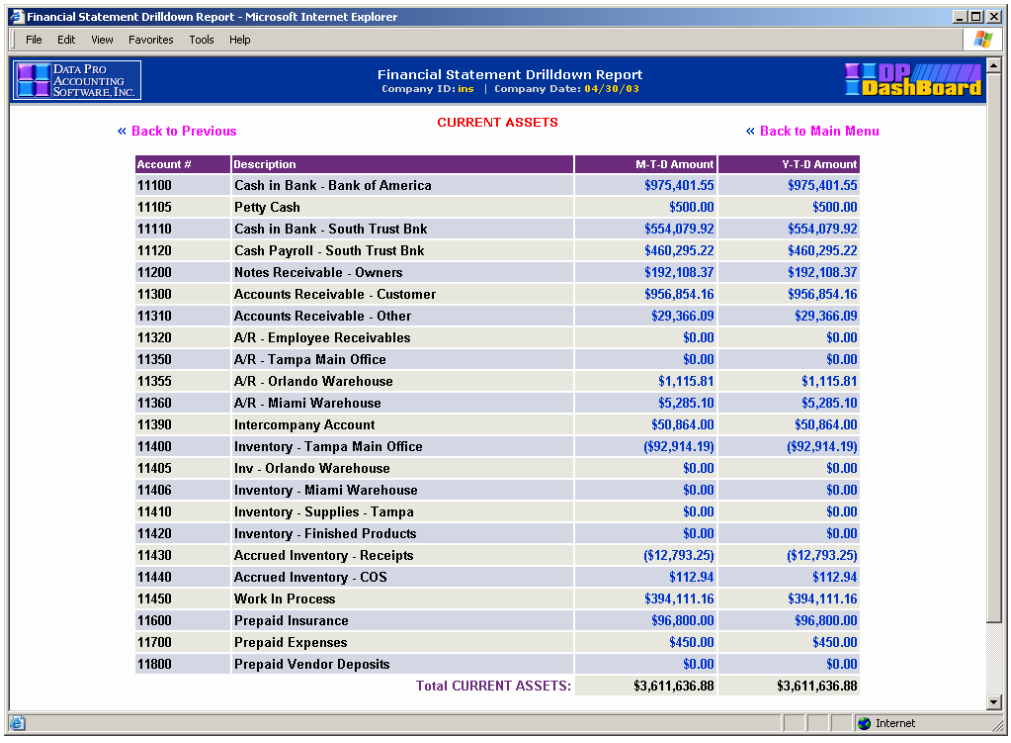
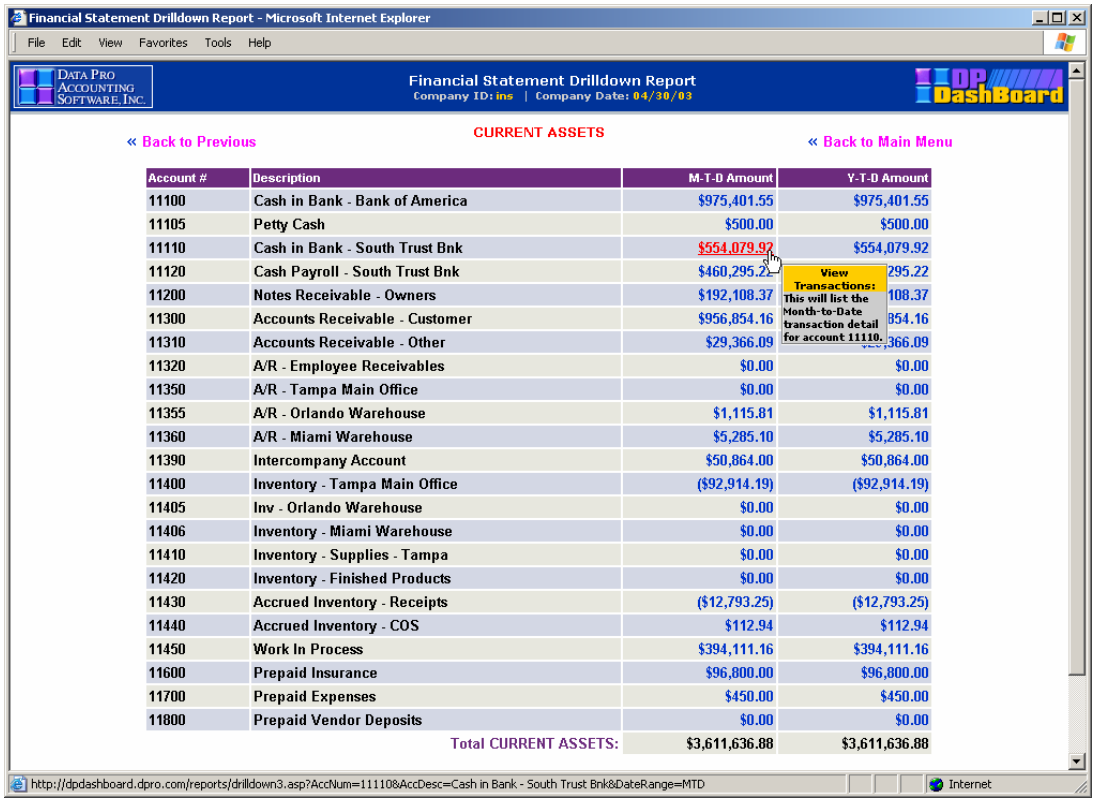


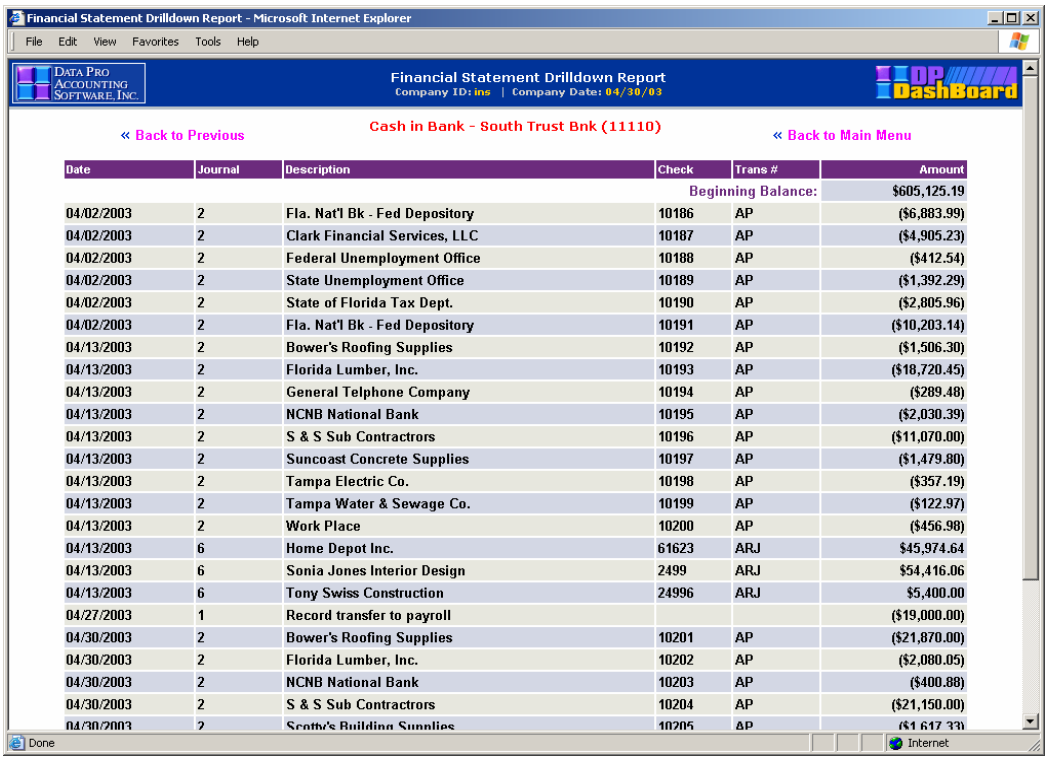
Figure 3-124. Current Assets Drilldown Report (Example)

2. <Click> a Balance in either the **M-T-D Account** or **Y-T-D Account** columns (Figure 3-125) to drilldown and display the next report level containing the detailed balance information (Figure 3-126).



Account #	Description	M-T-D Amount	Y-T-D Amount
11100	Cash in Bank - Bank of America	$975,401.55	$975,401.55
11105	Petty Cash	$500.00	$500.00
11110	Cash in Bank - South Trust Bnk	$554,079.92	$554,079.92
11120	Cash Payroll - South Trust Bnk	$460,295.22	295.22
11200	Notes Receivable - Owners	$192,108.37	108.37
11300	Accounts Receivable - Customer	$956,854.16	854.16
11310	Accounts Receivable - Other	$29,366.09	366.09
11320	A/R - Employee Receivables	$0.00	$0.00
11350	A/R - Tampa Main Office	$0.00	$0.00
11355	A/R - Orlando Warehouse	$1,115.81	$1,115.81
11360	A/R - Miami Warehouse	$5,285.10	$5,285.10
11390	Intercompany Account	$50,864.00	$50,864.00
11400	Inventory - Tampa Main Office	($92,914.19)	($92,914.19)
11405	Inv - Orlando Warehouse	$0.00	$0.00
11406	Inventory - Miami Warehouse	$0.00	$0.00
11410	Inventory - Supplies - Tampa	$0.00	$0.00
11420	Inventory - Finished Products	$0.00	$0.00
11430	Accrued Inventory - Receipts	($12,793.25)	($12,793.25)
11440	Accrued Inventory - COS	$112.94	$112.94
11450	Work In Process	$394,111.16	$394,111.16
11600	Prepaid Insurance	$96,800.00	$96,800.00
11700	Prepaid Expenses	$450.00	$450.00
11800	Prepaid Vendor Deposits	$0.00	$0.00
	Total CURRENT ASSETS:	$3,611,636.88	$3,611,636.88

Figure 3-125. Financial Statement Drilldown>Balance Sheet>Current Assets>Cash in Bank (example)



Date	Journal	Description	Check	Trans #	Amount
				Beginning Balance:	$605,125.19
04/02/2003	2	Fla. Nat'l Bk - Fed Depository	10186	AP	($6,883.99)
04/02/2003	2	Clark Financial Services, LLC	10187	AP	($4,905.23)
04/02/2003	2	Federal Unemployment Office	10188	AP	($412.54)
04/02/2003	2	State Unemployment Office	10189	AP	($1,392.29)
04/02/2003	2	State of Florida Tax Dept.	10190	AP	($2,805.96)
04/02/2003	2	Fla. Nat'l Bk - Fed Depository	10191	AP	($10,203.14)
04/13/2003	2	Bower's Roofing Supplies	10192	AP	($1,506.30)
04/13/2003	2	Florida Lumber, Inc.	10193	AP	($18,720.45)
04/13/2003	2	General Telphone Company	10194	AP	($289.48)
04/13/2003	2	NCNB National Bank	10195	AP	($2,030.39)
04/13/2003	2	S & S Sub Contractrors	10196	AP	($11,070.00)
04/13/2003	2	Suncoast Concrete Supplies	10197	AP	($1,479.80)
04/13/2003	2	Tampa Electric Co.	10198	AP	($357.19)
04/13/2003	2	Tampa Water & Sewage Co.	10199	AP	($122.97)
04/13/2003	2	Work Place	10200	AP	($456.98)
04/13/2003	6	Home Depot Inc.	61623	ARJ	$45,974.64
04/13/2003	6	Sonia Jones Interior Design	2499	ARJ	$54,416.06
04/13/2003	6	Tony Swiss Construction	24996	ARJ	$5,400.00
04/27/2003	1	Record transfer to payroll			($19,000.00)
04/30/2003	2	Bower's Roofing Supplies	10201	AP	($21,870.00)
04/30/2003	2	Florida Lumber, Inc.	10202	AP	($2,080.05)
04/30/2003	2	NCNB National Bank	10203	AP	($400.88)
04/30/2003	2	S & S Sub Contractrors	10204	AP	($21,150.00)
04/30/2003	2	Scotty's Building Supplies	10205	AP	($1,617.33)

Figure 3-126. Cash in Bank Drilldown Report (example)

The following table describes the details in the lowest level drilldown report:

Date	Date of transaction of the listed components.
Journal	Displays journal entry number assigned in the Infinity POWER GL module. It may be up to five (5) characters (alpha/numeric).
Description	Description of transaction type of the listed components. User definable, 15-20 alpha/numeric characters.
Check	Check number associated with the listed components.
Transaction #	Transaction number associated with listed components.
Amount	Total accrued balance for the selected component (either M-T-D or Y-T-D).

Cashflow

This Financial Statement Drilldown option displays a financial report in Cashflow format, providing the month-to-date (M-T-D) and year-to-date (Y-T-D) cashflow amounts for Net Income, numerous account ranges, and Cash & Cash Equivalent at Beginning of Period. Cashflow is a summary of your business' inflows and outflows over a specified period of time.

This will give you some indication of your business' ability to create the resources necessary for expansion, or ability to support the business owner, as well as recognize excessive cash flow gaps.

NOTE

When the company has a **"cash inflow"** into the business relative to a specific account or category, it will be reflected on this report as a positive number. Accounts or categories that have used cash and created a **"cash outflow"** during this period will reflect negative amounts.

To Display a Statement of Cash Flows:

1. From the Financial Statement Drilldown Reports Screen, select a **Cashflow Financial Statement** format defined in your system. In the INS Sample Co. this would appear as **Cashflow – Statement of Cash Flows** in the Financial Statement Format pull-down menu. The Statement of Cash Flows report displays (Figure 3-127).

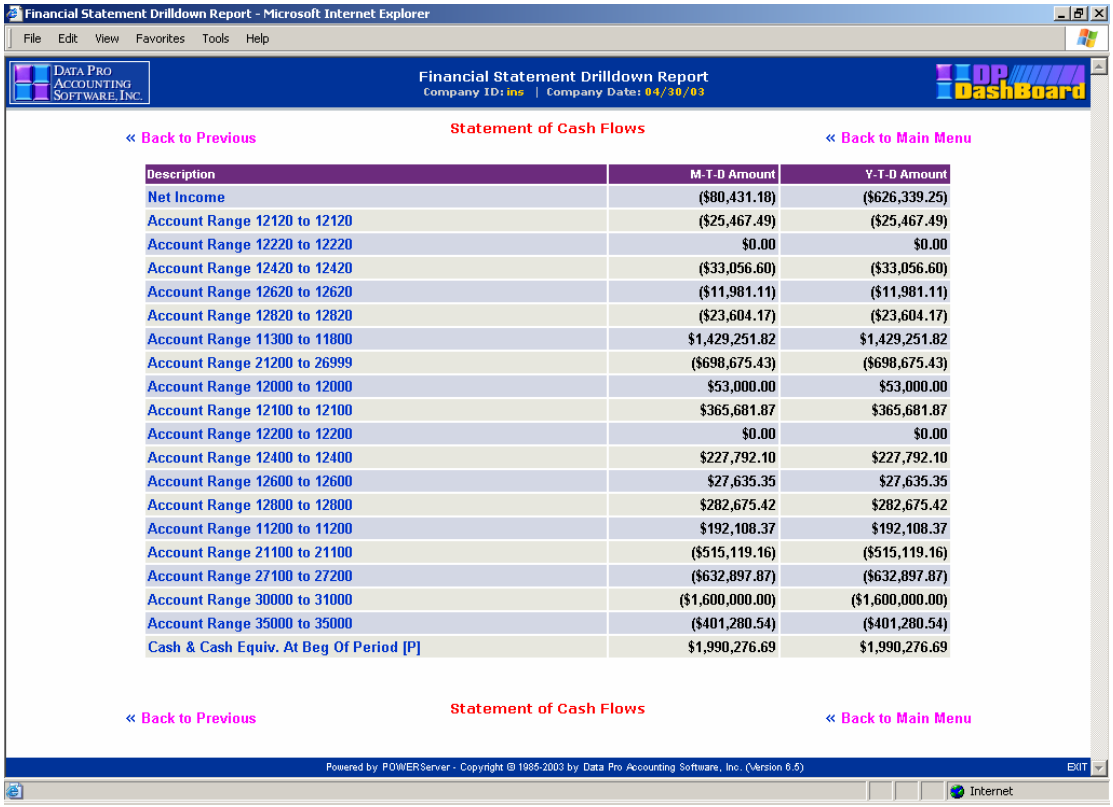


Figure 3-127. Statement of Cash Flows Report

To Drilldown a Statement of Cash Flows:

1. <Click> a component in the **Description** column of the cashflow report (Figure 3-128) to drilldown and display the next report level (e.g. Net Income). The Statement of Cash Flows report screen displays containing the M-T-D and Y-T-D balances for the selected component (Figure 3-129).

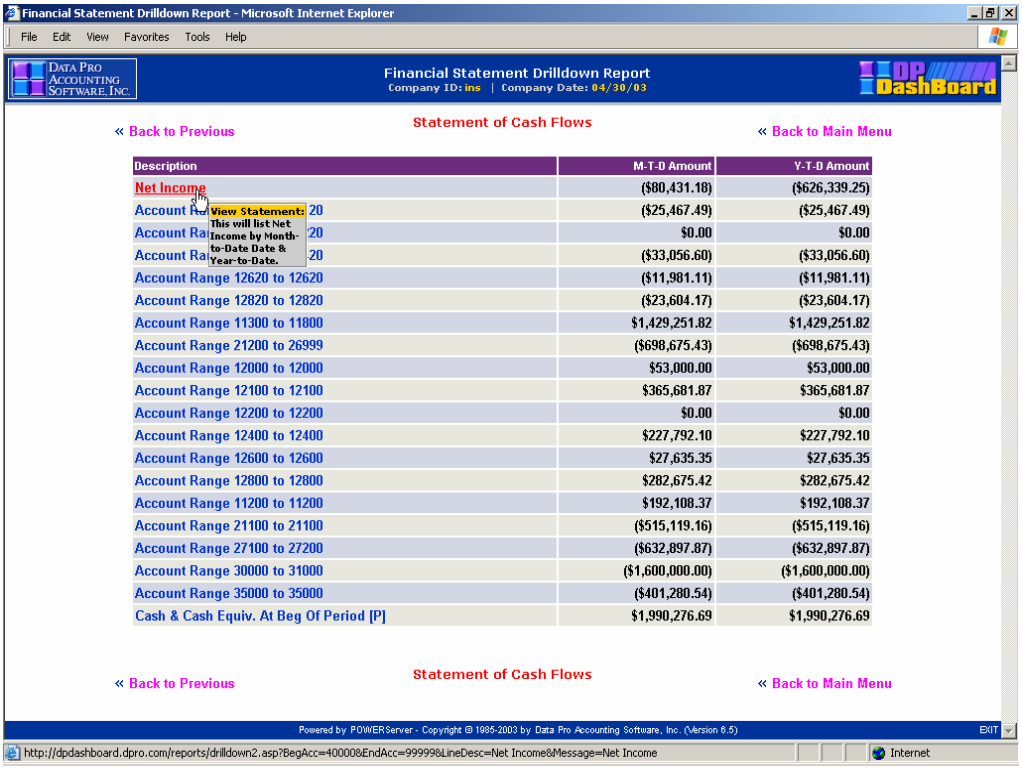


Figure 3-128. Financial Statement Drilldown>Cashflow>Net Income (example)

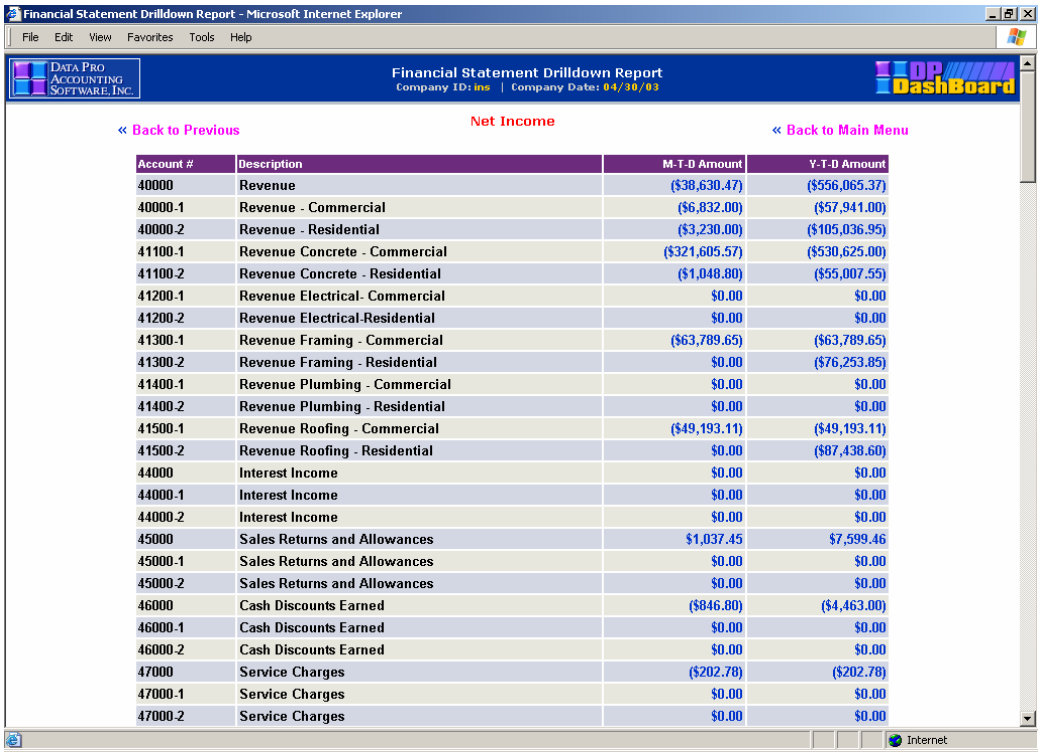
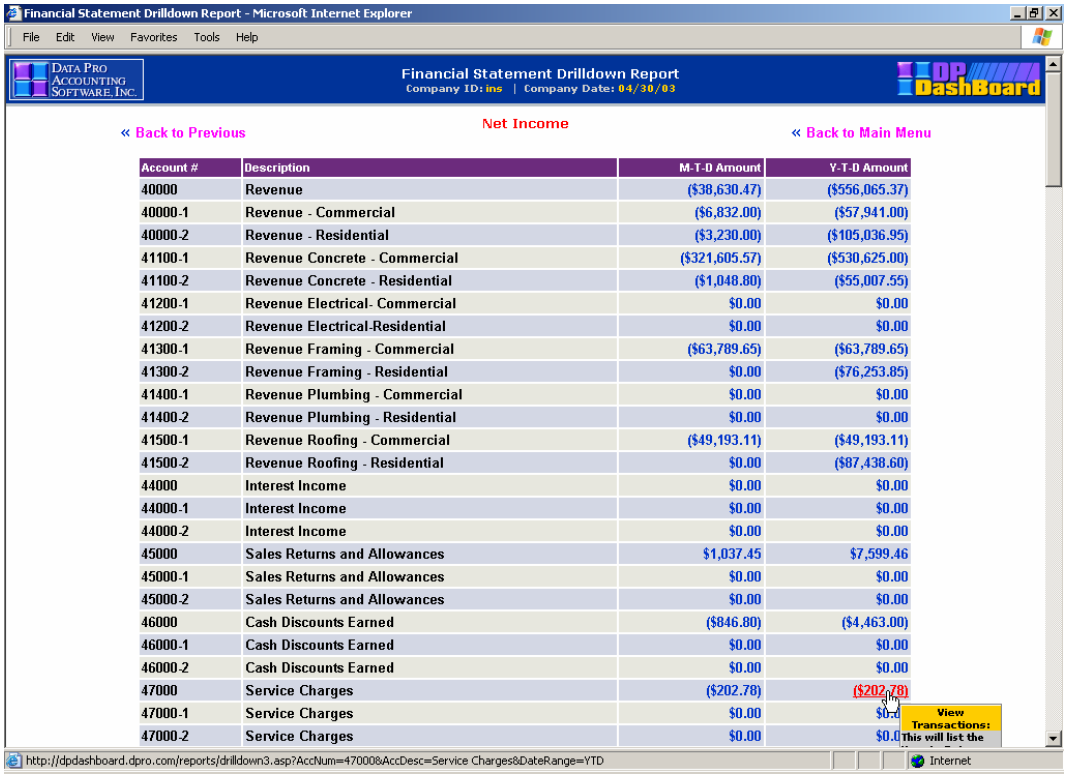


Figure 3-129. Net Income Drilldown Report (example)

2. <Click> a component in either the **M-T-D Account** or **Y-T-D Account** columns (Figure 3-130) to drilldown and display the next report level containing the detailed cashflow information (Figure 3-131).



Account #	Description	M-T-D Amount	Y-T-D Amount
40000	Revenue	($38,630.47)	($556,065.37)
40000-1	Revenue - Commercial	($6,832.00)	($57,941.00)
40000-2	Revenue - Residential	($3,230.00)	($105,036.95)
41100-1	Revenue Concrete - Commercial	($321,605.57)	($530,625.00)
41100-2	Revenue Concrete - Residential	($1,048.80)	($55,007.55)
41200-1	Revenue Electrical- Commercial	$0.00	$0.00
41200-2	Revenue Electrical-Residential	$0.00	$0.00
41300-1	Revenue Framing - Commercial	($63,789.65)	($63,789.65)
41300-2	Revenue Framing - Residential	$0.00	($76,253.85)
41400-1	Revenue Plumbing - Commercial	$0.00	$0.00
41400-2	Revenue Plumbing - Residential	$0.00	$0.00
41500-1	Revenue Roofing - Commercial	($49,193.11)	($49,193.11)
41500-2	Revenue Roofing - Residential	$0.00	($87,438.60)
44000	Interest Income	$0.00	$0.00
44000-1	Interest Income	$0.00	$0.00
44000-2	Interest Income	$0.00	$0.00
45000	Sales Returns and Allowances	$1,037.45	$7,599.46
45000-1	Sales Returns and Allowances	$0.00	$0.00
45000-2	Sales Returns and Allowances	$0.00	$0.00
46000	Cash Discounts Earned	($846.80)	($4,463.00)
46000-1	Cash Discounts Earned	$0.00	$0.00
46000-2	Cash Discounts Earned	$0.00	$0.00
47000	Service Charges	($202.78)	($202.78)
47000-1	Service Charges	$0.00	$0.00
47000-2	Service Charges	$0.00	$0.00

Figure 3-130. Financial Statement Drilldown>Cashflow>Net Income>Service Charges (example)

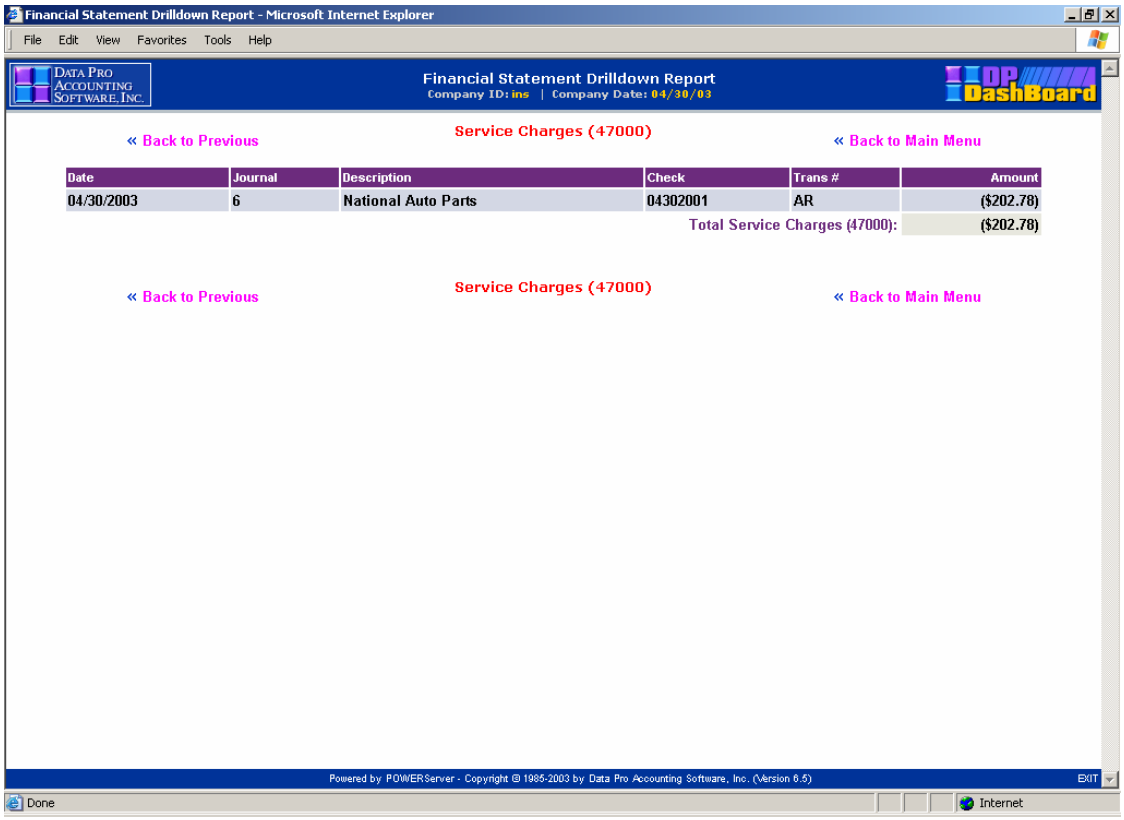


Figure 3-131. Service Charges Drilldown Report (example)

The following table describes the **Service Charges** report details:

Date	Date of transaction of the listed components.
Journal	Displays journal entry number assigned in the Infinity POWER GL module. It may be up to five (5) characters (alpha/numeric).
Description	Description of transaction type of the listed components.
Check	Check number associated with the listed components.
Transaction #	Transaction number associated with listed components.
Amount	Total accrued balance for the selected component (either M-T-D or Y-T-D).

Income Statement

This Financial Statement Drilldown option displays a financial report in Income Statement format, providing the month-to-date (M-T-D) and year-to-date (Y-T-D) income for the following components: Revenue, COGS ACCTS, OPERATING EXPENSES, and specified account ranges.

To Display an Income Statement:

1. From the Financial Statement Drilldown Reports Screen, select a Financial Statement format defined in your system. In the INS Sample Co. this would appear as **Income–Income Statement or Income2 – Income Statement/Whole Dollars** in the Financial Statement Format pull-down menu. The appropriate Income Statement report displays (Figure 3-132).

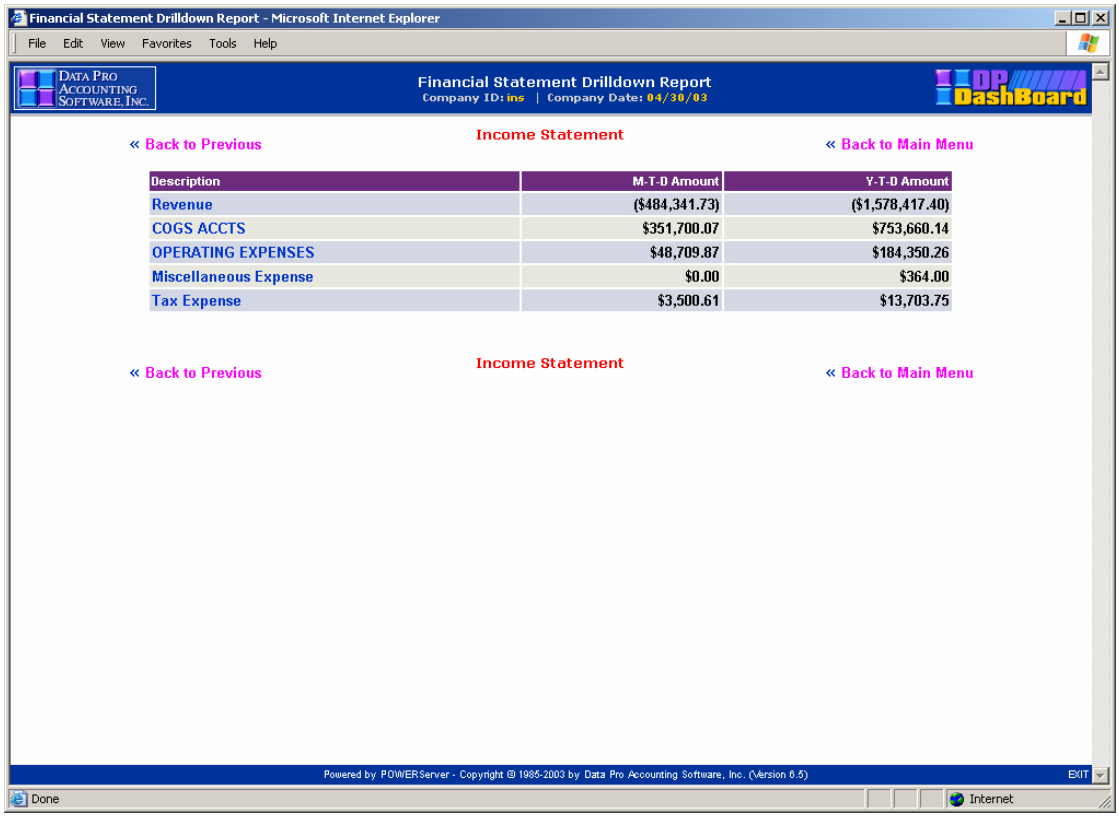


Figure 3-132. Income Statement Report

To Drilldown an Income Statement:

1. <Click> a component in the **Description** column of the Income Statement report (Figure 3-133) to drilldown and display the next report level (e.g. Operating Expenses). The Financial Statement Drilldown Report screen displays containing the M-T-D and Y-T-D balances for the selected component (Figure 3-134).

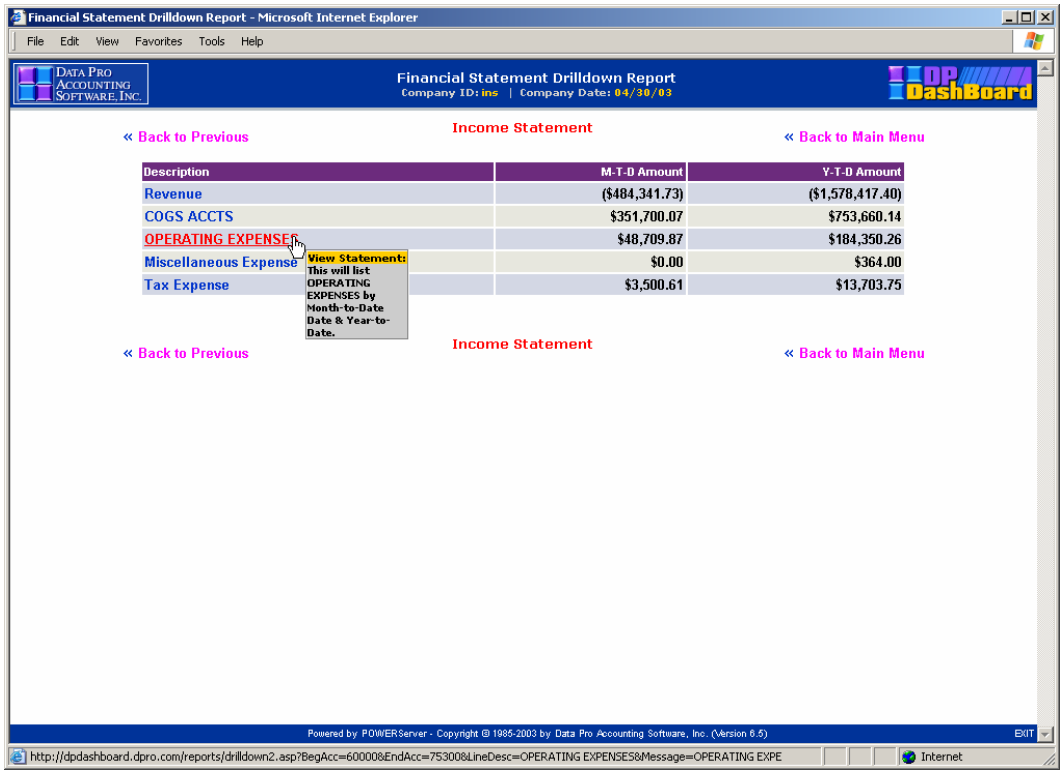


Figure 3-133. Financial Statement Drilldown>Income – Income Statement>Operating Expenses (example)

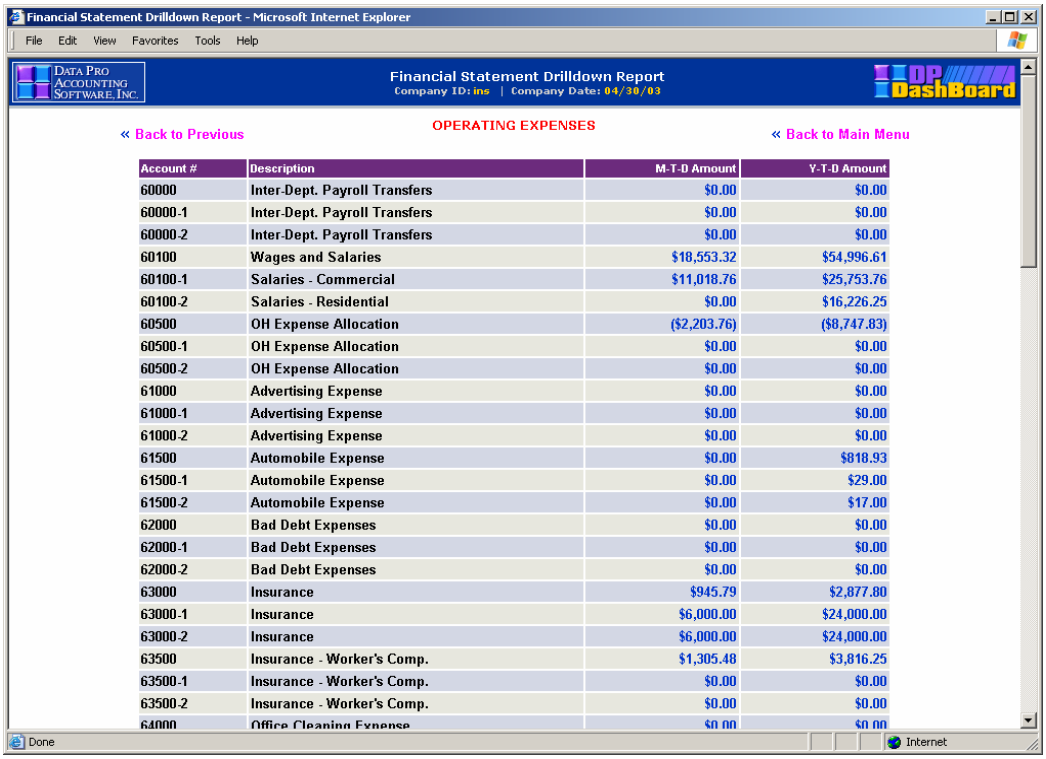


Figure 3-134. Operating Expenses Drilldown Report (example)

2. <Click> a component in either the **M-T-D Account** or **Y-T-D Account** columns (Figure 3-135) to drilldown and display the next report level containing the detailed income information (Figure 3-136).

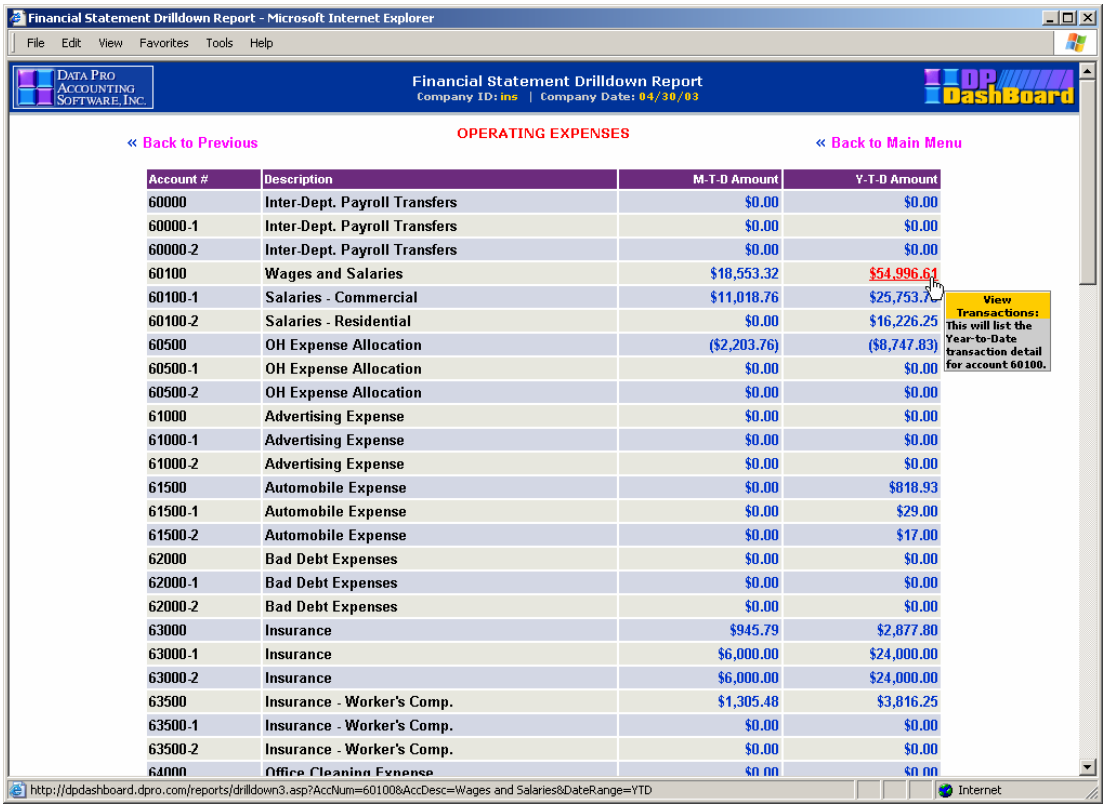


Figure 3-135. Financial Statement Drilldown>Income – Income Statement>Operating Expenses>Wages and Salaries (example)

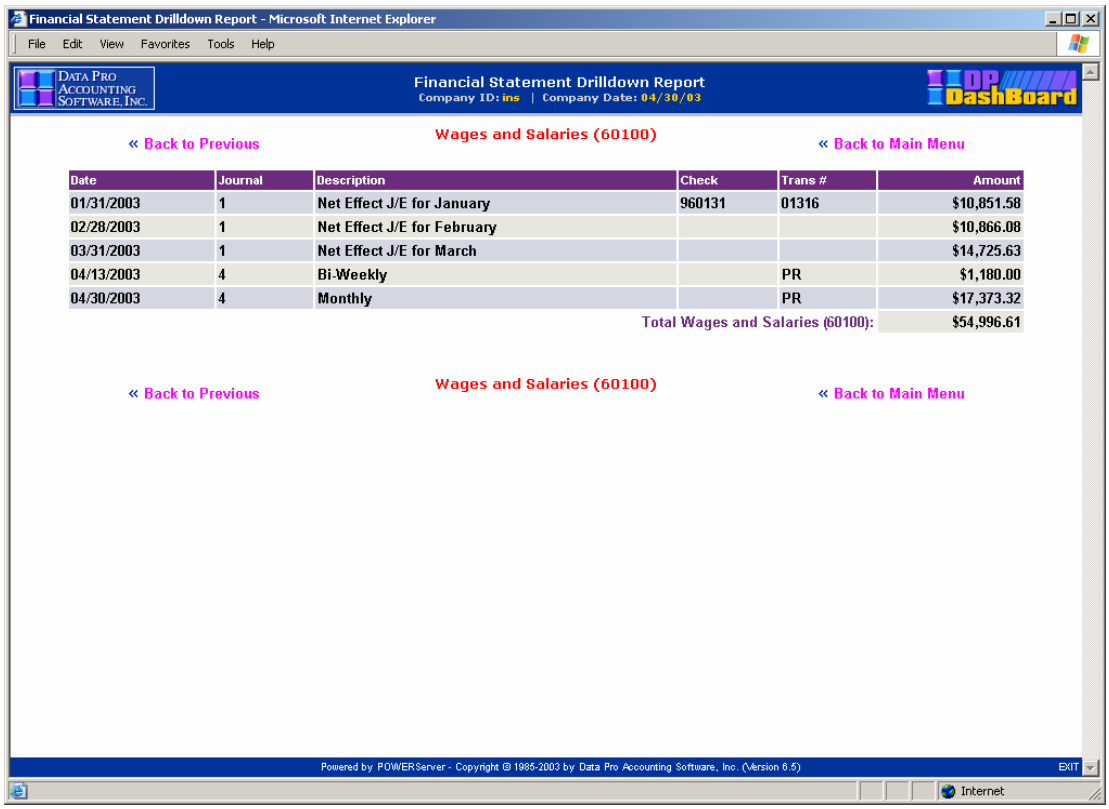


Figure 3-136. Financial Statement Drilldown>Income – Income Statement>Operating Expenses>Wages and Salaries Report (example)

The following table describes the **Wages and Salaries** report details:

Date	Date of transaction of the listed components.
Journal	Displays journal entry number assigned in the Infinity POWER GL module. It may be up to five (5) alpha/numeric characters.
Description	Description of transaction type of the listed components.
Check	Check number associated with the listed components.
Transaction #	Transaction number associated with listed components.
Amount	Total accrued balance for the selected component . (either M-T-D or Y-T-D).

Bank Account Balances

This option displays the true balance for associated General Ledger Cash Accounts. The cash balance in your books never agrees with the balance shown on the bank statement due to the delay of unrecorded transactions, checks, deposits, and errors. The Bank Account Balance function performs a bank reconciliation on the specified account. Such information includes both the account balance (balance without consideration for deposits/debits to the account) and the book balance (balance after consideration for cleared and outstanding checks, cleared and outstanding deposits, etc).

Once all information is posted to the General Ledger, the data is immediately available for printing financial reports such as the Bank Account Balances.

The following screen illustrates where the **Reports & Drilldowns>Bank Account Balances** option is located on the DP/DashBoard Menu System screen (Figure 3-137).

Figure 3-137. Reports & Drilldowns>Bank Account Balances

To Display a Bank Account Balances Report:

1. In the center of the DP/DashBoard Menu System screen System Window, select the **Bank Account Balances** option from the DP/DashBoard Reports & Drilldowns section. The Bank Account Balances screen displays (Figure 3-138).

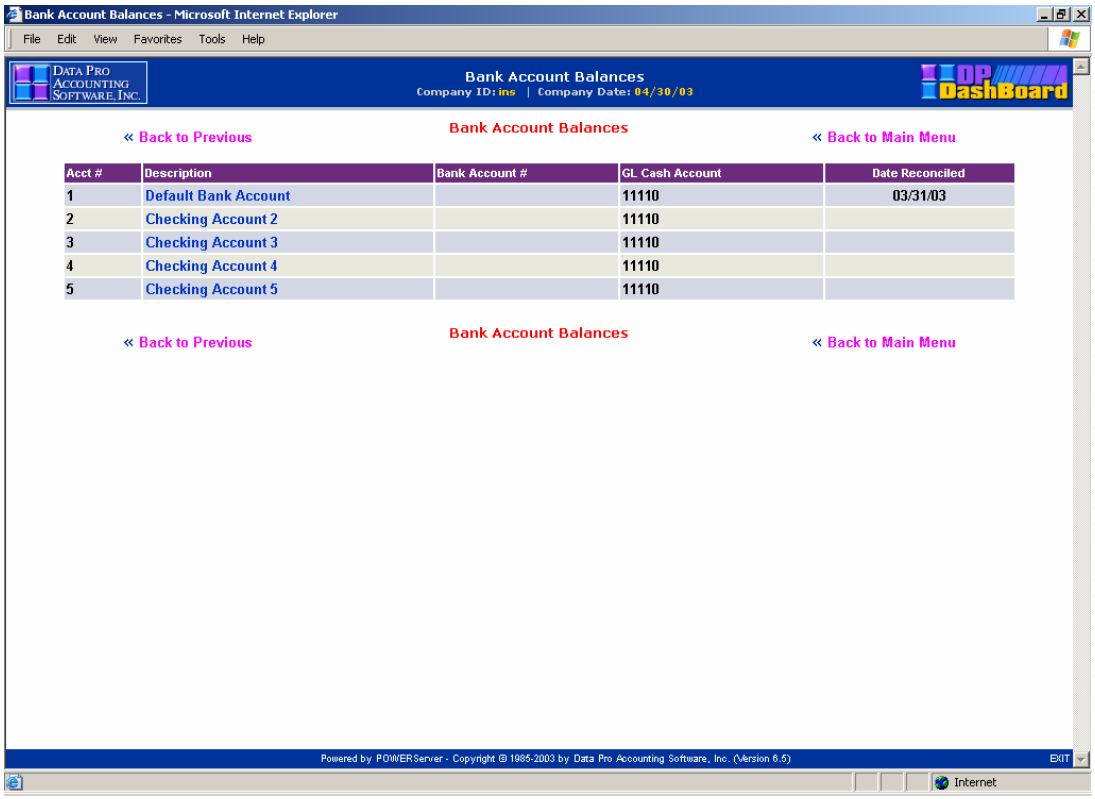


Figure 3-138. Bank Account Balances Screen

The following table describes the **Bank Account Balances** screen details:

Acct #	Incrementally numbers accounts as they are added. Newer accounts display at the bottom of the list.
Description	Selecting a component in this column allows you to view the reconciliation on that account.
Bank Account #	Actual account number assigned by the bank.
GL Cash Account	General Ledger Cash Account number.
Date Reconciled	Date in which the specified account is balanced.

To Drilldown a Bank Account Balances Report:

1. <Click> a component in the **Description** column of the Bank Account Balances report (Figure 3-139) to drilldown and display the next report level (e.g. Default Bank Account). The Bank Account Balances screen displays containing the detailed account information for the selected component (Figure 3-140).

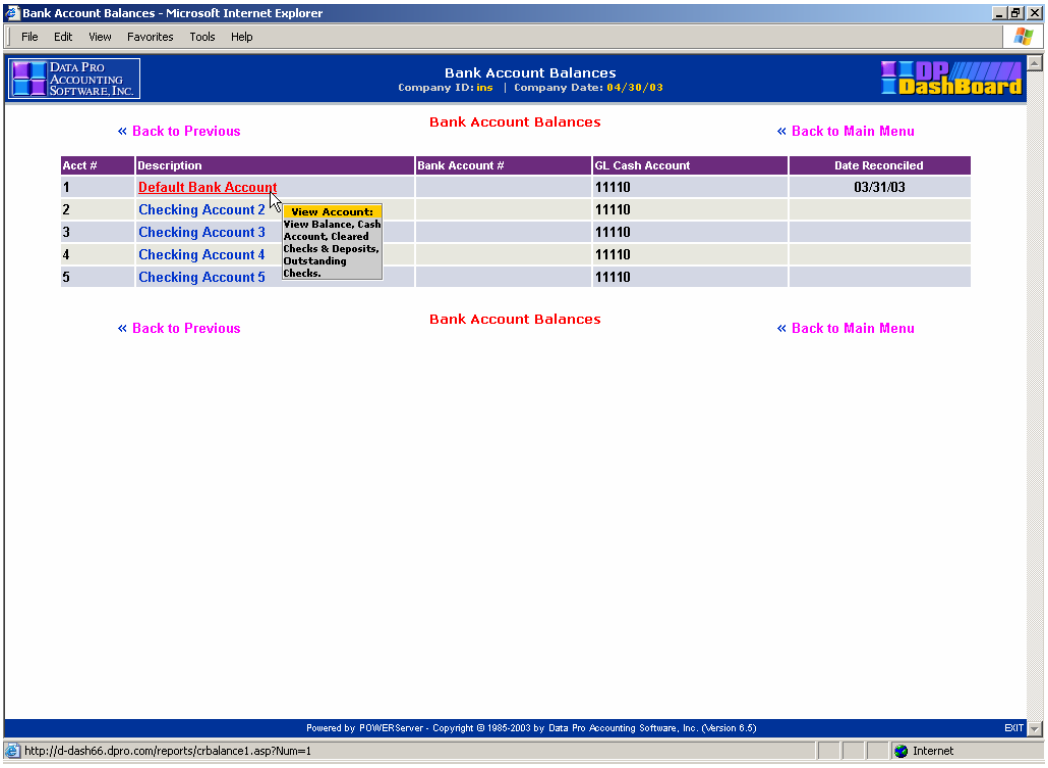


Figure 3-139. Reports & Drilldowns>Bank Account Balances>Description Drilldown (1 of 2)

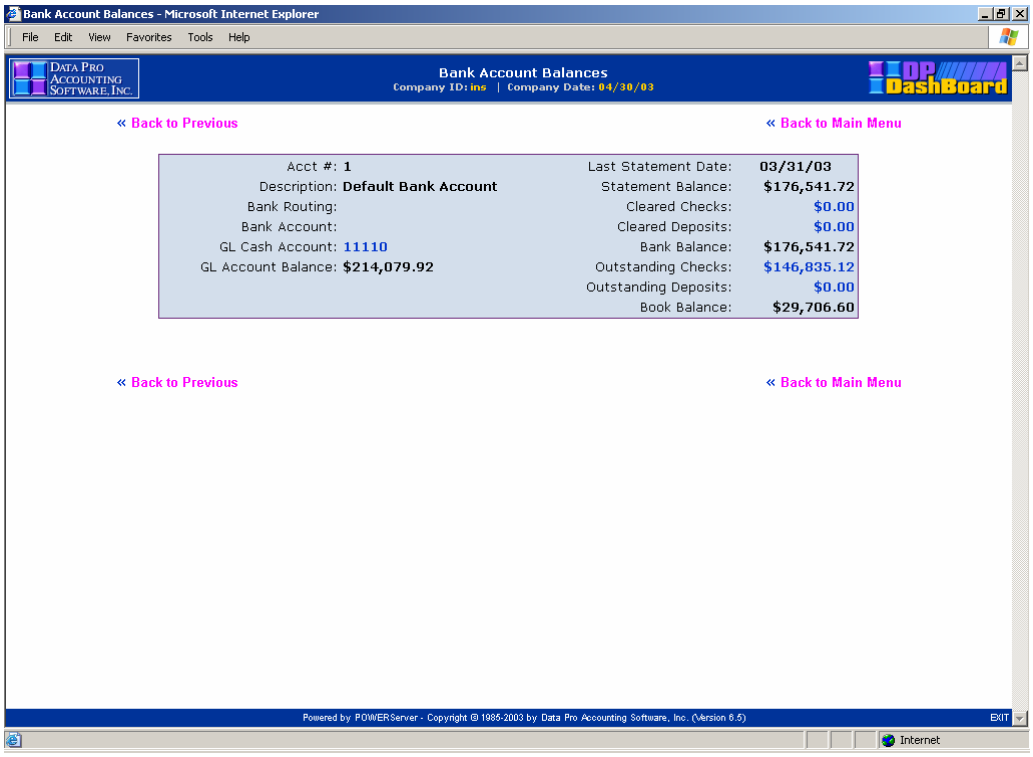


Figure 3-140. Reports & Drilldowns>Bank Account Balances>Description Drilldown (2 of 2)

2. <Click> the desired component (**GL Cash Account**, **Cleared Checks**, **Cleared Deposits**, **Outstanding Checks**, or **Outstanding Deposits** (Figure 3-141) to drilldown and display the next report level containing the specified detailed information. The appropriate report displays (Figure 3-142).

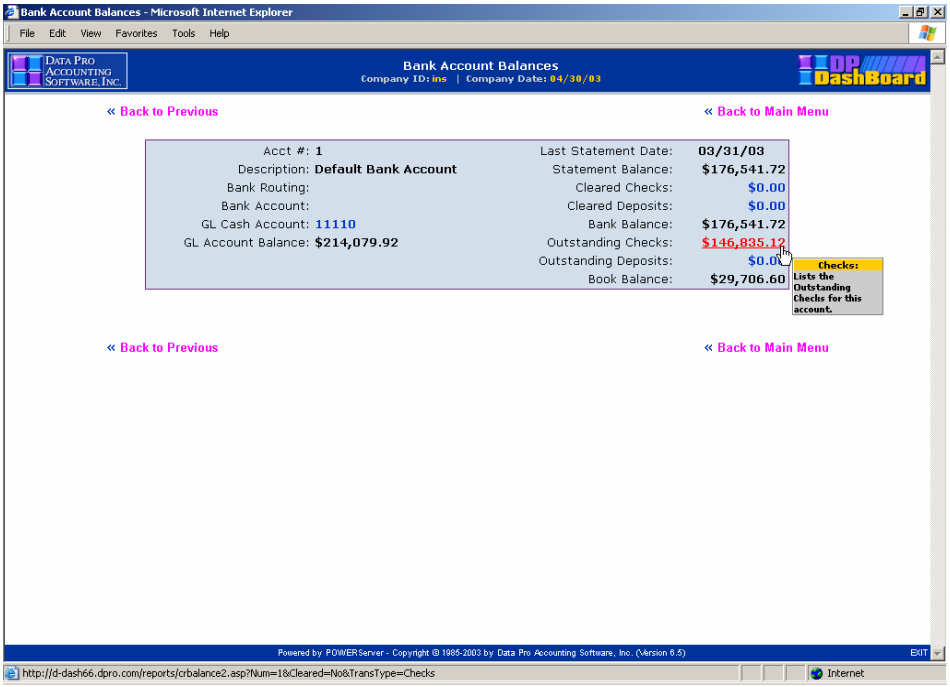


Figure 3-141. Bank Account Balances Screen>Default Bank Account<Outstanding Checks (example)

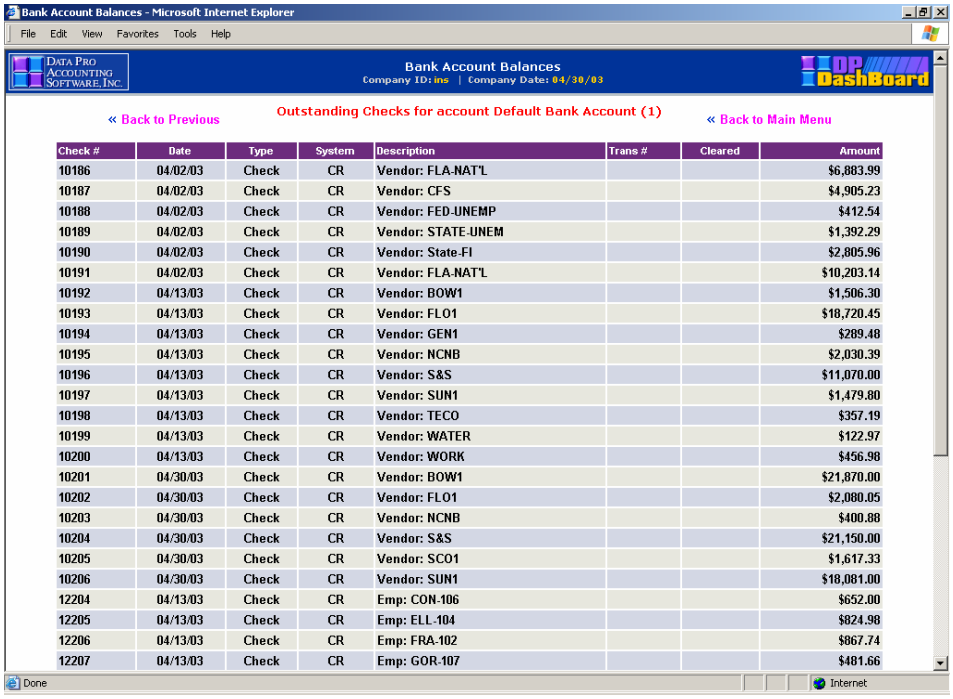


Figure 3-142. Bank Account Balances Screen>Default Bank Account<Outstanding Checks Displayed (example)

Accounts Payable Aging & Drilldown

This option lists the balances due to your suppliers and other creditors. The Accounts Payable Aging report provides a breakdown by supplier of the total amount of your accounts payable balance (past or future). Using this report can inform you of any discrepancies in satisfying your accounts payable. If the report indicates you have several bills past due, you may need to reevaluate how your cash flow is being managed. It is common to run an accounts payable aging report at the end of each month.

NOTE

The sum of the amounts you owe to your suppliers is listed as a current liability on your balance sheet.

The following screen illustrates where the **Reports & Drilldowns>Accounts Payable Aging and Drilldown** option is located on the DP/DashBoard Menu System screen (Figure 3-143).

Figure 3-143. Reports & Drilldowns>Accounts Payable Aging & Drilldown

To Display an Accounts Payable Aging & Drilldown Report:

1. In the center of the DP/DashBoard Menu System screen System screen, select the **Accounts Payable Aging & Drilldown** option from the Reports & Drilldowns section. The Accounts Payable Aging & Drilldown screen displays (Figure 3-144).

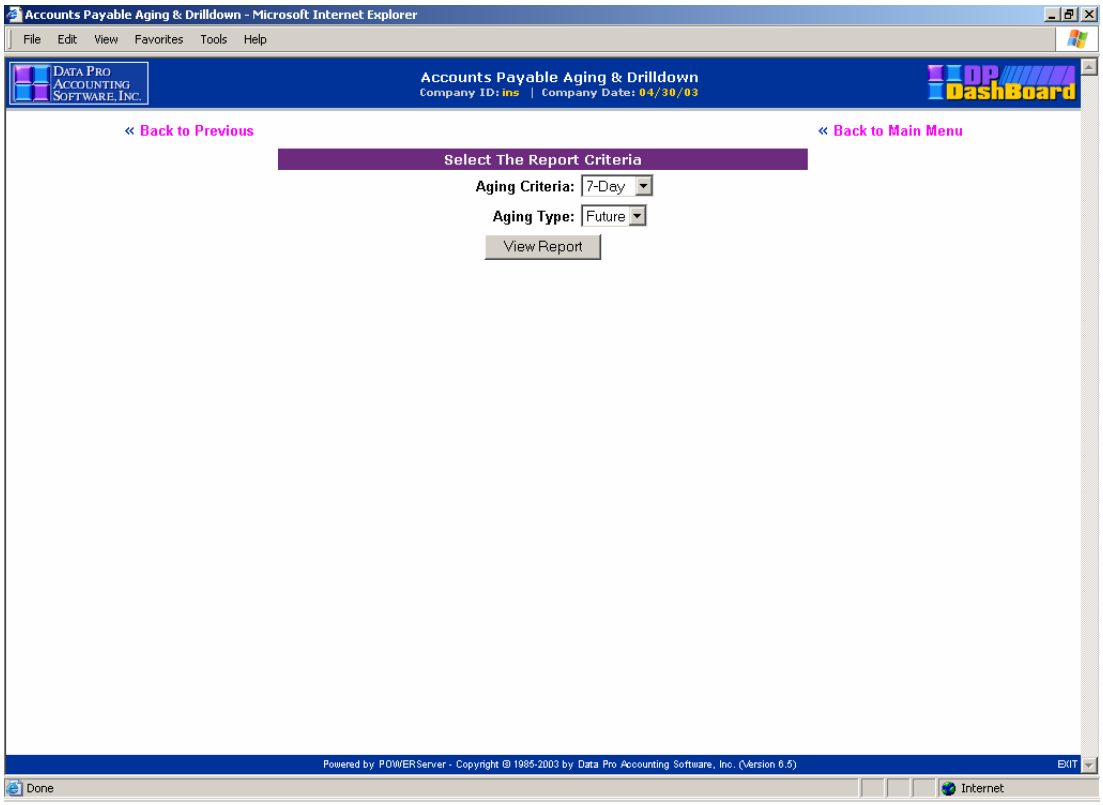


Figure 3-144. Accounts Payable Aging & Drilldown Screen

2. Select the desired report age (7-day or 30-day) to be run from the **Aging Criteria** pull-down menu.
3. Select the desired aging type (Future or Past) from the **Aging Type** pull-down menu.
4. <Click> the **View Report** button. The appropriate Aging & Drilldown report displays in the format specified (Figure 3-145).

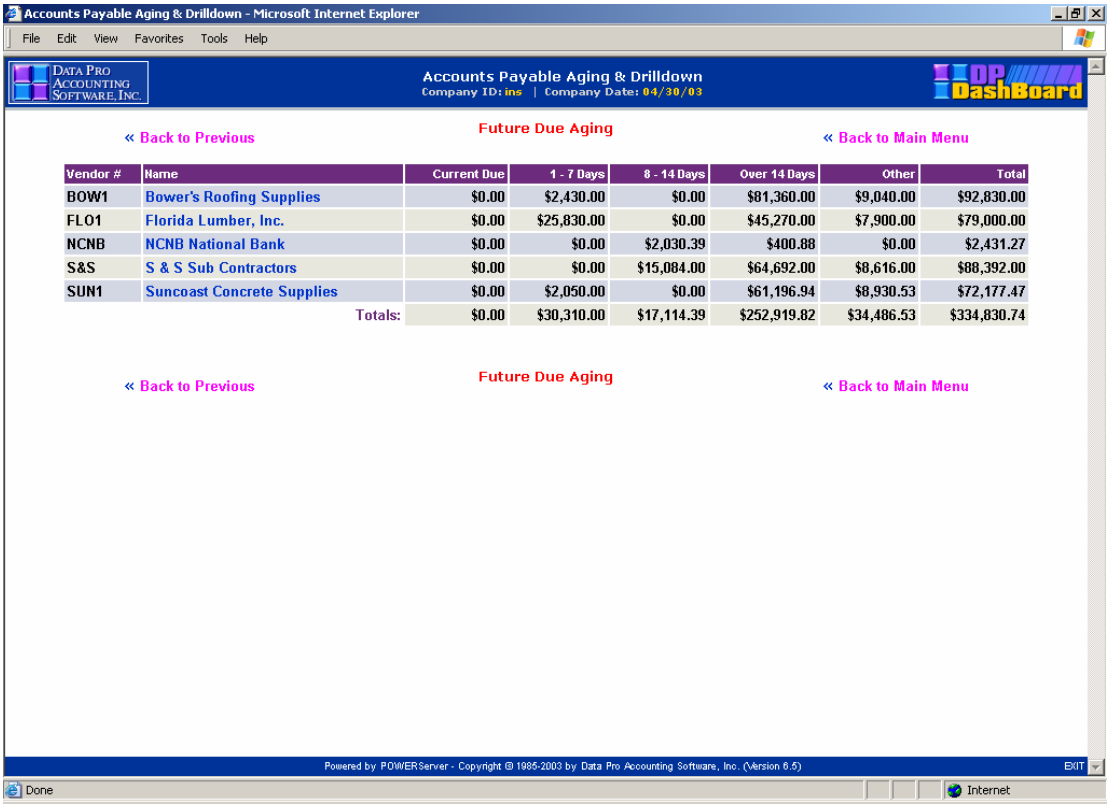


Figure 3-145. Accounts Payable Aging & Drilldown >7-Day-Future Aging Report (example)

The following table describes the **Accounts Payable Past/Future Due Aging** report details:

Vendor #	Number associated with the Vendor Name as defined in the Infinity POWER Accounts Payable module.
Name	Name of the supplier/creditor owed payment.
Current Due	Current balance owed to the specified vendor.
1-7 Days	For Past Aging: Lists the amount owed to specified vendor in the previous week. For Future Aging: Lists amount owed to specified vendor in the following week.
8-14 Days	For Past Aging: List the amount owed to specified vendor in the previous two weeks. For Future Aging: Lists the amount owed to specified vendor in the following two weeks.
Over 14	For Past Aging: Lists the amount owed to specified vendor over two weeks prior. For Future Aging: Lists the amount owed to specified vendor beyond the following two weeks.
Other	Summary column for all other open items that are outside the range of the Define Aging categories.
Total	Displays the total amount owed to the specified vendor.

To Drilldown an Accounts Payable Aging & Drilldown Report:

1. <Click> a component in the **Name** column (Figure 3-146) of the Past/Future Due Aging report to drilldown by customer and display the next report level (e.g. Bower's Roofing Supplies). The Past/Future Due Aging screen displays (Figure 3-147) depending on the criteria selected.

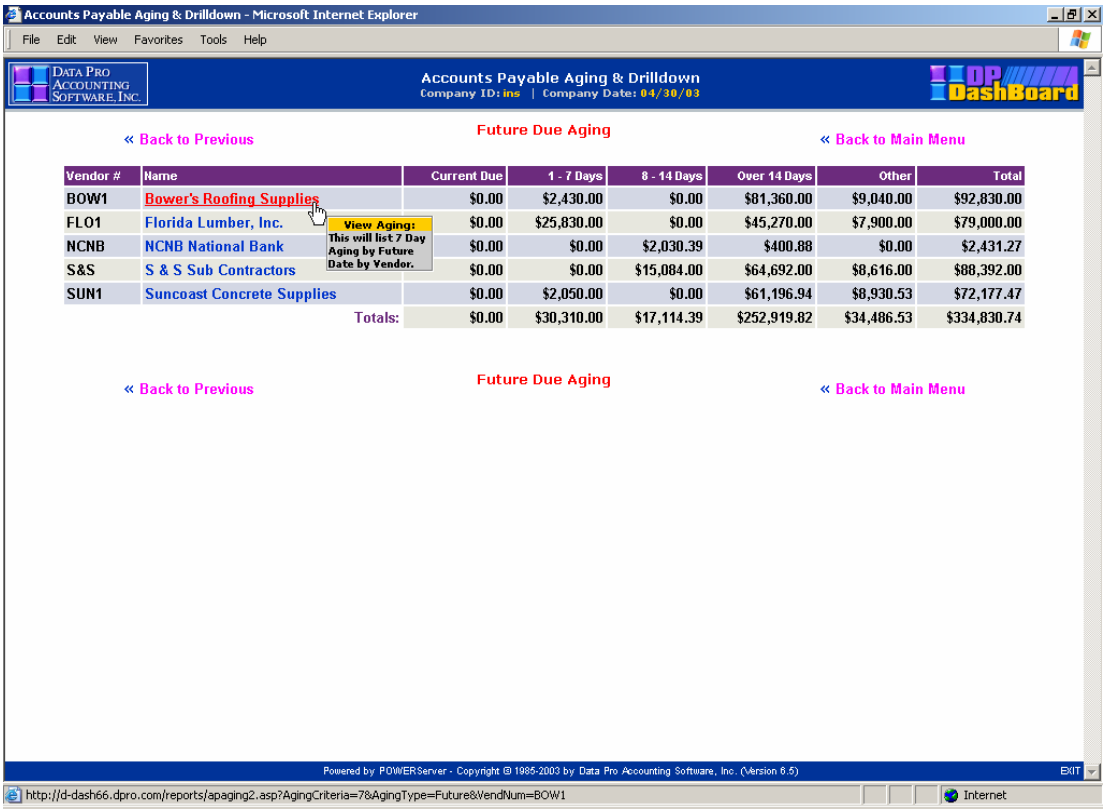


Figure 3-146. Accounts Payable Aging & Drilldown >7-Day-Future Aging Report >Customer Drilldown Report (example)
1 of 2

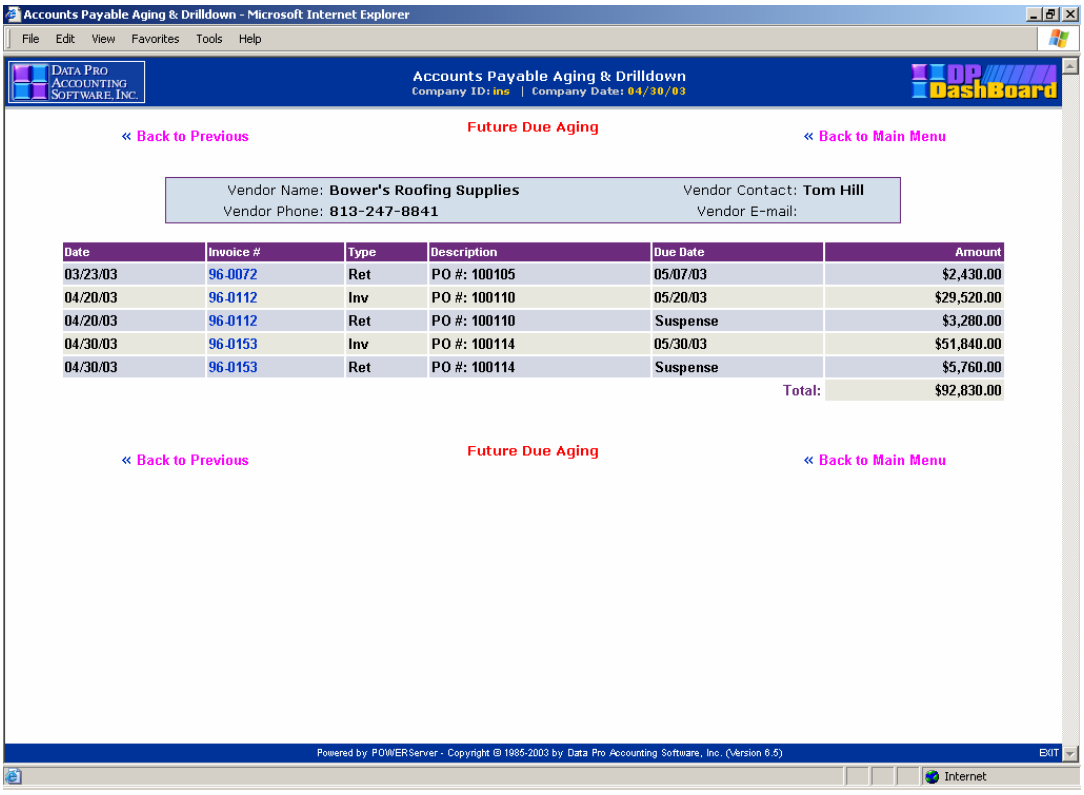


Figure 3-147. Accounts Payable Aging & Drilldown >7-Day-Future Aging Report >Customer Drilldown Report (example)
2 of 2

The following table describes the **Accounts Payable Customer** drilldown report details:

Vendor Name	Name of the supplier/creditor.
Vendor Phone	Phone number of the vendor contact.
Vendor Contact	Name of contact for the supplier/creditor.
Vendor E-mail	E-mail address of the vendor contact.
Date	Date of the transaction.
Invoice #	Invoice number associated with the associated vendor name. You can drilldown to view detailed transaction data in the format specified for Aging Criteria (7-day, 30-day) and Aging Type (Past or Future).
Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Description	Describes the purchase order number (PO #) associated with the transaction.
Due Date	Date the amount is owed to the specified vendor.
Amount	Total amount due the to specified vendor.

2. <Click> a component in the **Invoice #** column (Figure 3-148) to drilldown by invoice and display the next report level containing the specified detailed information. The Past/Future Due Aging report displays (Figure 3-149).

NOTE

By clicking on the detail headers, items listed can toggle between ascending and descending order

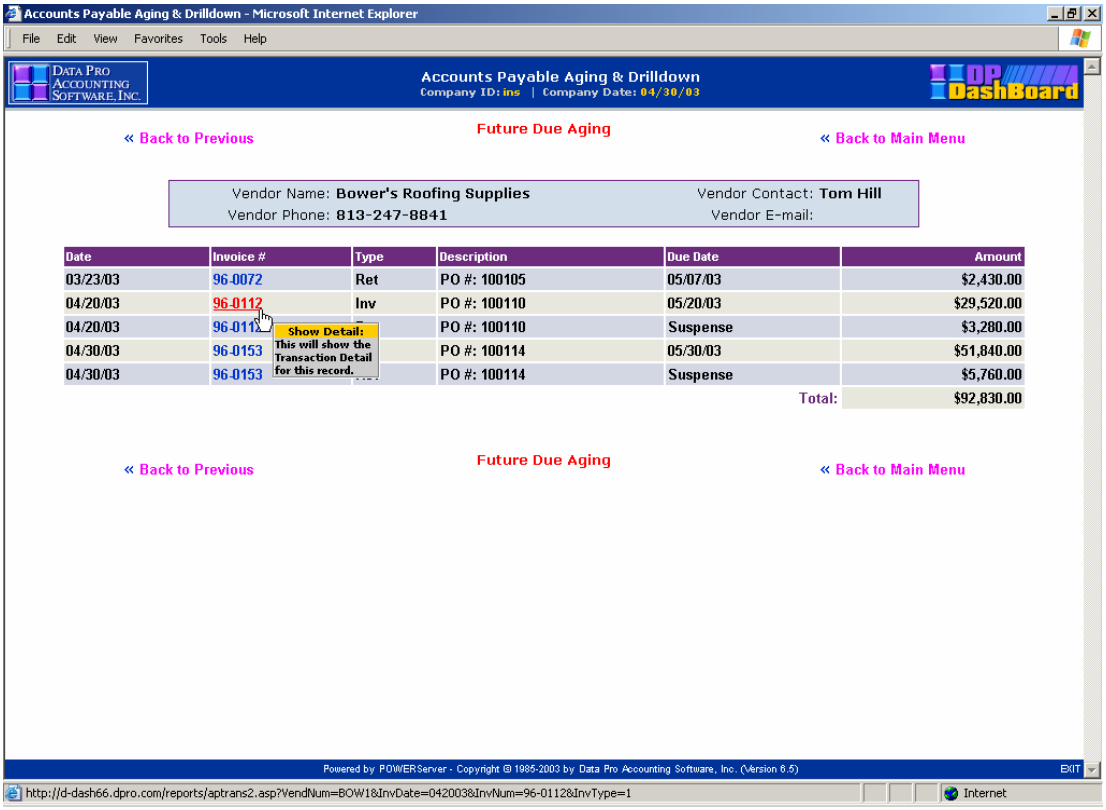


Figure 3-148. Accounts Payable Aging & Drilldown >7-Day-Future Aging Report >Customer Drilldown>Invoice Drilldown Report (example)
1 of 2

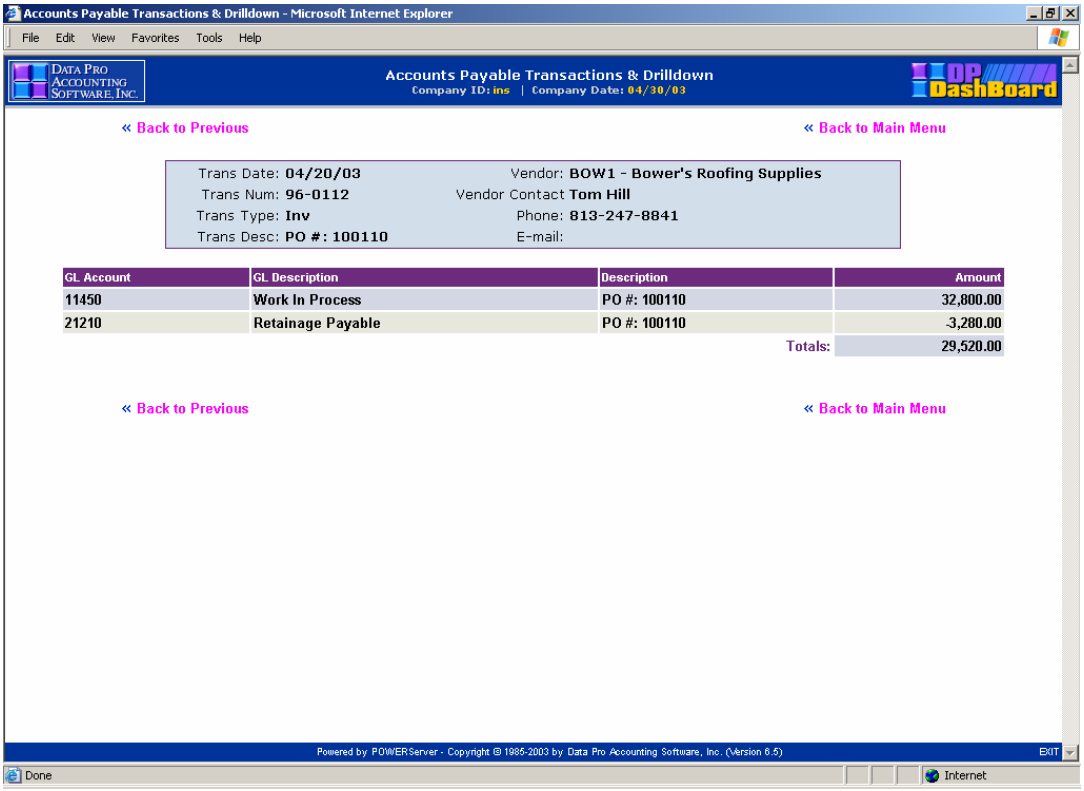


Figure 3-149. Accounts Payable Aging & Drilldown >7-Day-Future Aging Report >Customer Drilldown>Invoice Drilldown Report (example)
2 of 2

The following table describes the **Accounts Payable invoice** drilldown report details:

Trans Date	Date of transaction of the listed components.
Transaction Num	Transaction number associated with listed components.
Trans Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Desc	Describes the purchase order number (PO #) associated with the transaction.
Vendor	Name of the supplier/creditor.
Vendor Contact	Name of contact for the supplier/creditor.
Phone	Phone number of the vendor contact.
E-mail	E-mail address of the vendor contact.
GL Account	Account number of the associated General Ledger cash account.
GL Description	Status of the associated General Ledger cash account.
Description	Describes the purchase order number (PO #) associated with the transaction.
Amount	Total balance owed to specified vendor.

Accounts Payable Transactions & Drilldown

This option lists the payable transaction history for the active company selected. The Accounts Payable Transaction report provides a breakdown by supplier of all payable items for a specified period of time.

The following screen illustrates where the **Reports & Drilldowns>Accounts Payable Transactions & Drilldown** option is located on the DP/DashBoard Menu System screen (Figure 2-150).

Figure 2-150. Reports & Drilldowns>Accounts Payable Transactions & Drilldown

To Display an Accounts Payable Transactions & Drilldown Report:

1. In the center of the DP/DashBoard Menu System screen System screen, select the **Accounts Payable Transactions & Drilldown** option from the Reports & Drilldowns section. The Accounts Payable Transactions & Drilldown screen displays (Figure 3-151).

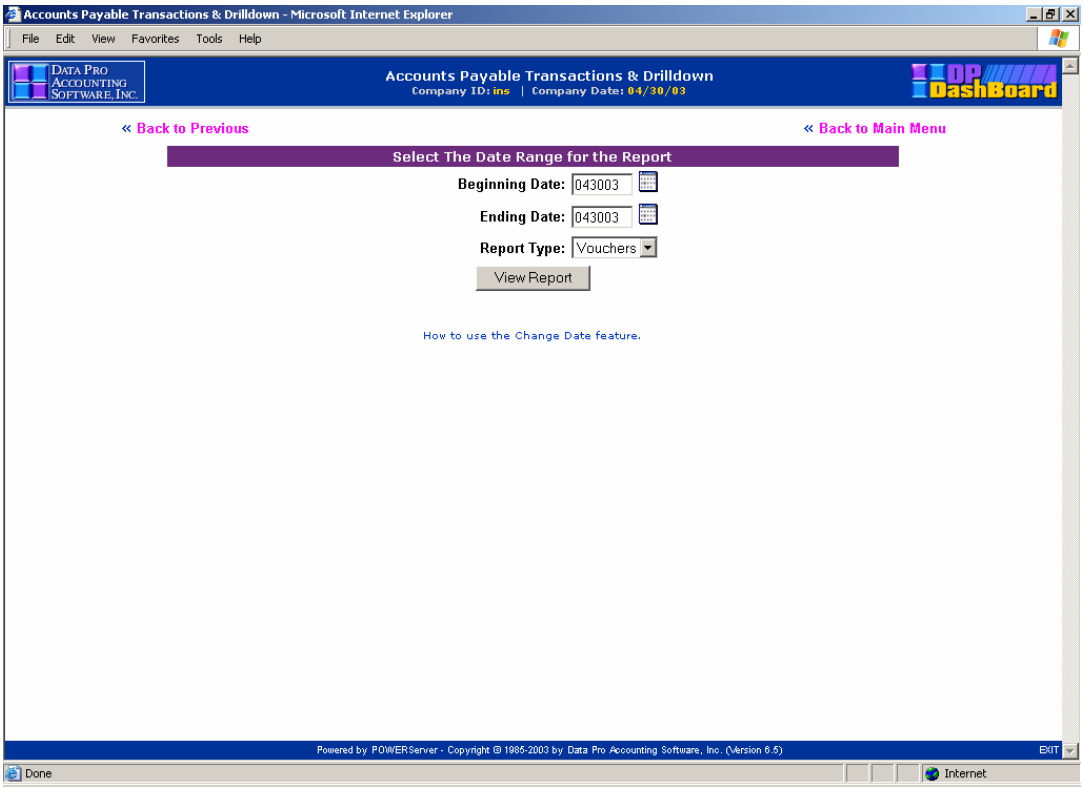
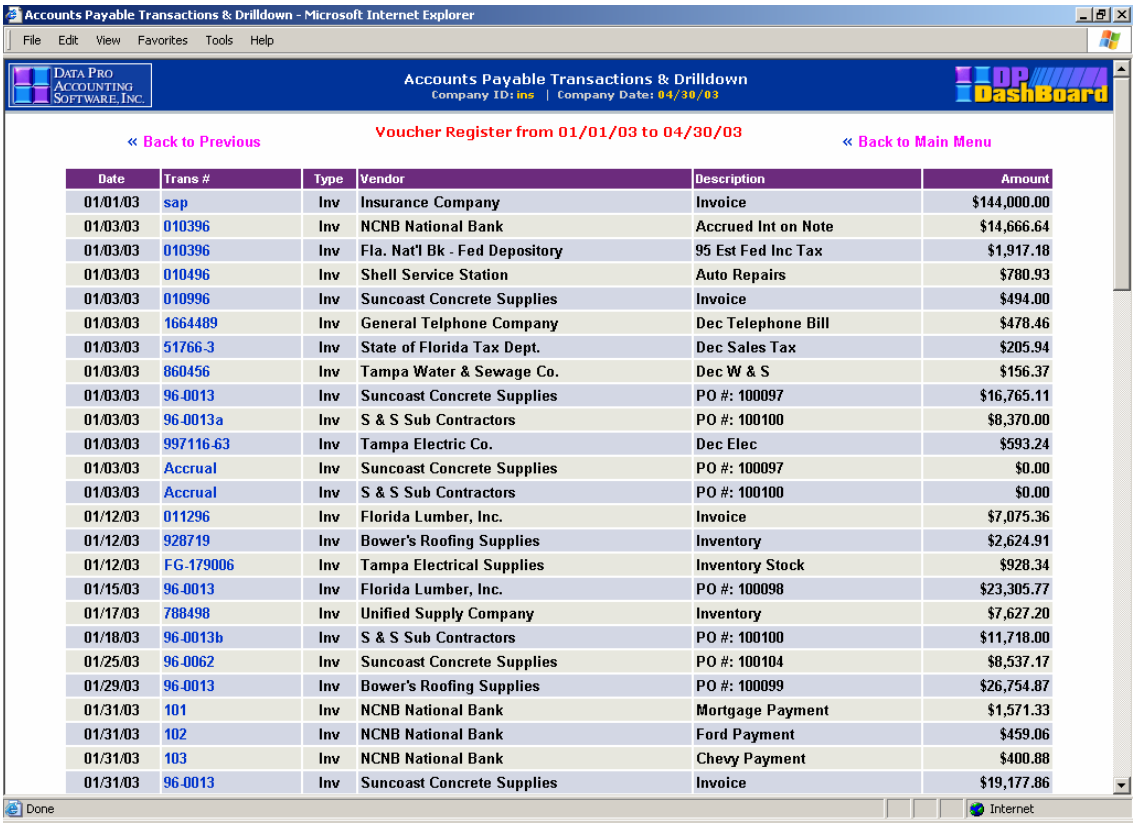


Figure 3-151. Accounts Payable Transactions & Drilldown Screen

2. <Click> the calendar icon next to the **Event Date** display box to select the desired date for the event. Hint: <Click> on **<<** to change the month prior to the current date, or <click> **>>** to change the month after the current date. The calendar closes and the selected beginning date displays.
3. Select the desired report type (vouchers or checks) from the **Report Type** pull-down menu.
4. <Click the **View Report** button. The appropriate register report displays (Figure 3-152) listing all payable items for the specified date range.



Date	Trans #	Type	Vendor	Description	Amount
01/01/03	sap	Inv	Insurance Company	Invoice	$144,000.00
01/03/03	010396	Inv	NCNB National Bank	Accrued Int on Note	$14,666.64
01/03/03	010396	Inv	Fla. Nat'l Bk - Fed Depository	95 Est Fed Inc Tax	$1,917.18
01/03/03	010496	Inv	Shell Service Station	Auto Repairs	$780.93
01/03/03	010996	Inv	Suncoast Concrete Supplies	Invoice	$494.00
01/03/03	1664489	Inv	General Telphone Company	Dec Telephone Bill	$478.46
01/03/03	51766-3	Inv	State of Florida Tax Dept.	Dec Sales Tax	$205.94
01/03/03	860456	Inv	Tampa Water & Sewage Co.	Dec W & S	$156.37
01/03/03	96-0013	Inv	Suncoast Concrete Supplies	PO #: 100097	$16,765.11
01/03/03	96-0013a	Inv	S & S Sub Contractors	PO #: 100100	$8,370.00
01/03/03	997116-63	Inv	Tampa Electric Co.	Dec Elec	$593.24
01/03/03	Accrual	Inv	Suncoast Concrete Supplies	PO #: 100097	$0.00
01/03/03	Accrual	Inv	S & S Sub Contractors	PO #: 100100	$0.00
01/12/03	011296	Inv	Florida Lumber, Inc.	Invoice	$7,075.36
01/12/03	928719	Inv	Bower's Roofing Supplies	Inventory	$2,624.91
01/12/03	FG-179006	Inv	Tampa Electrical Supplies	Inventory Stock	$928.34
01/15/03	96-0013	Inv	Florida Lumber, Inc.	PO #: 100098	$23,305.77
01/17/03	788498	Inv	Unified Supply Company	Inventory	$7,627.20
01/18/03	96-0013b	Inv	S & S Sub Contractors	PO #: 100100	$11,718.00
01/25/03	96-0062	Inv	Suncoast Concrete Supplies	PO #: 100104	$8,537.17
01/29/03	96-0013	Inv	Bower's Roofing Supplies	PO #: 100099	$26,754.87
01/31/03	101	Inv	NCNB National Bank	Mortgage Payment	$1,571.33
01/31/03	102	Inv	NCNB National Bank	Ford Payment	$459.06
01/31/03	103	Inv	NCNB National Bank	Chevy Payment	$400.88
01/31/03	96-0013	Inv	Suncoast Concrete Supplies	Invoice	$19,177.86

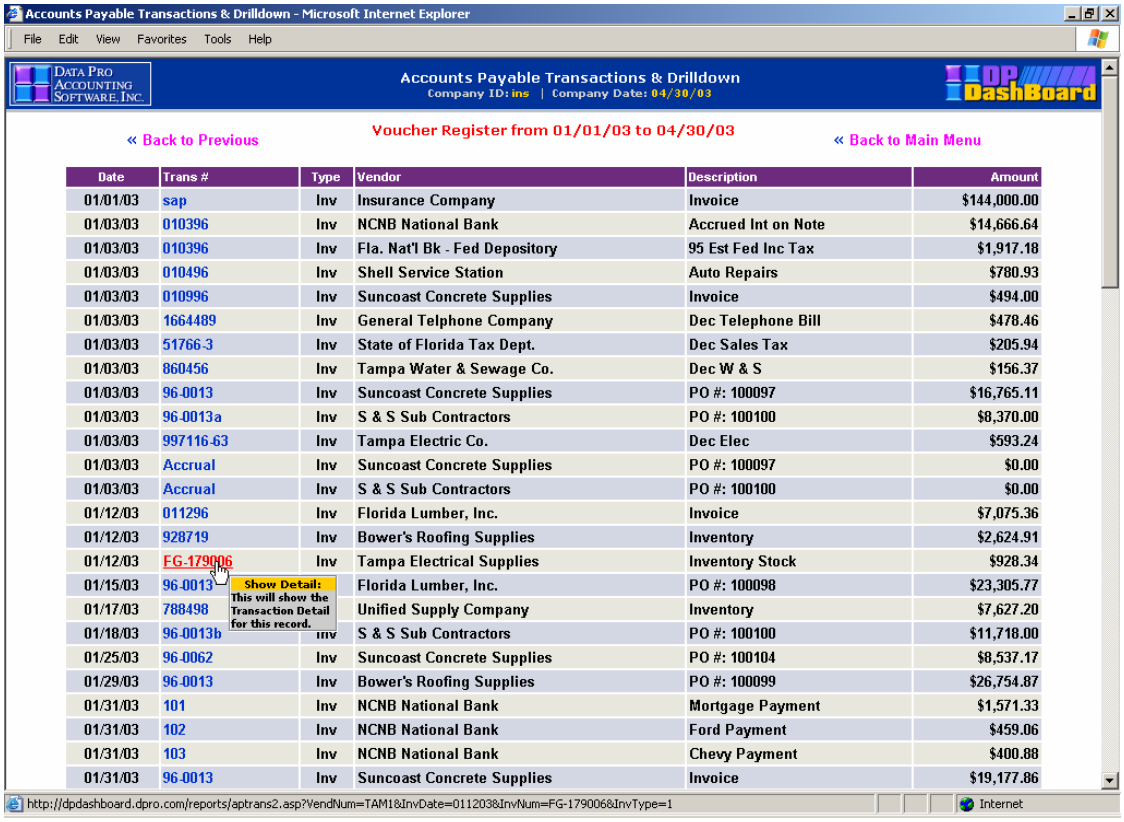
Figure 3-152. Accounts Payable Transactions & Drilldown >General Ledger Accounts Summary Report (example)

The following table describes the **Accounts Payable Transactions General Ledger Accounts Summary** report details:

Date	Date of each transaction listed for the specified date range.
Trans #	Number associated with transactions listed for the specified date range.
Type	Describes the type of transaction for each one listed. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Vendor	Name of the supplier/creditor associated with each transaction listed.
Description	Describes the purpose of the transaction.
Amount	Amount due for each supplier/creditor associated with each transaction listed.

To Drilldown an Accounts Payable Transactions & Drilldown Report:

1. <Click> a component in the **Trans #** column (Figure 3-153) of the General Ledger Accounts Summary report to drilldown by transaction number and display the next report level (e.g. Tampa Electric Co.). The Accounts Payable Transactions & Drilldown screen (Figure 3-154) displays with details on the selected transaction.



Date	Trans #	Type	Vendor	Description	Amount
01/01/03	sap	Inv	Insurance Company	Invoice	$144,000.00
01/03/03	010396	Inv	NCNB National Bank	Accrued Int on Note	$14,666.64
01/03/03	010396	Inv	Fla. Nat'l Bk - Fed Depository	95 Est Fed Inc Tax	$1,917.18
01/03/03	010496	Inv	Shell Service Station	Auto Repairs	$780.93
01/03/03	010996	Inv	Suncoast Concrete Supplies	Invoice	$494.00
01/03/03	1664489	Inv	General Telphone Company	Dec Telephone Bill	$478.46
01/03/03	51766-3	Inv	State of Florida Tax Dept.	Dec Sales Tax	$205.94
01/03/03	860456	Inv	Tampa Water & Sewage Co.	Dec W & S	$156.37
01/03/03	96-0013	Inv	Suncoast Concrete Supplies	PO #: 100097	$16,765.11
01/03/03	96-0013a	Inv	S & S Sub Contractors	PO #: 100100	$8,370.00
01/03/03	997116-63	Inv	Tampa Electric Co.	Dec Elec	$593.24
01/03/03	Accrual	Inv	Suncoast Concrete Supplies	PO #: 100097	$0.00
01/03/03	Accrual	Inv	S & S Sub Contractors	PO #: 100100	$0.00
01/12/03	011296	Inv	Florida Lumber, Inc.	Invoice	$7,075.36
01/12/03	928719	Inv	Bower's Roofing Supplies	Inventory	$2,624.91
01/12/03	FG-179006	Inv	Tampa Electrical Supplies	Inventory Stock	$928.34
01/15/03	96-0013	Inv	Florida Lumber, Inc.	PO #: 100098	$23,305.77
01/17/03	788498	Inv	Unified Supply Company	Inventory	$7,627.20
01/18/03	96-0013b	Inv	S & S Sub Contractors	PO #: 100100	$11,718.00
01/25/03	96-0062	Inv	Suncoast Concrete Supplies	PO #: 100104	$8,537.17
01/29/03	96-0013	Inv	Bower's Roofing Supplies	PO #: 100099	$26,754.87
01/31/03	101	Inv	NCNB National Bank	Mortgage Payment	$1,571.33
01/31/03	102	Inv	NCNB National Bank	Ford Payment	$459.06
01/31/03	103	Inv	NCNB National Bank	Chevy Payment	$400.88
01/31/03	96-0013	Inv	Suncoast Concrete Supplies	Invoice	$19,177.86

Figure 3-153. Accounts Payable Transactions & Drilldown>General Ledger Accounts Summary Report>Trans # Drilldown Report (example)
1 of 2

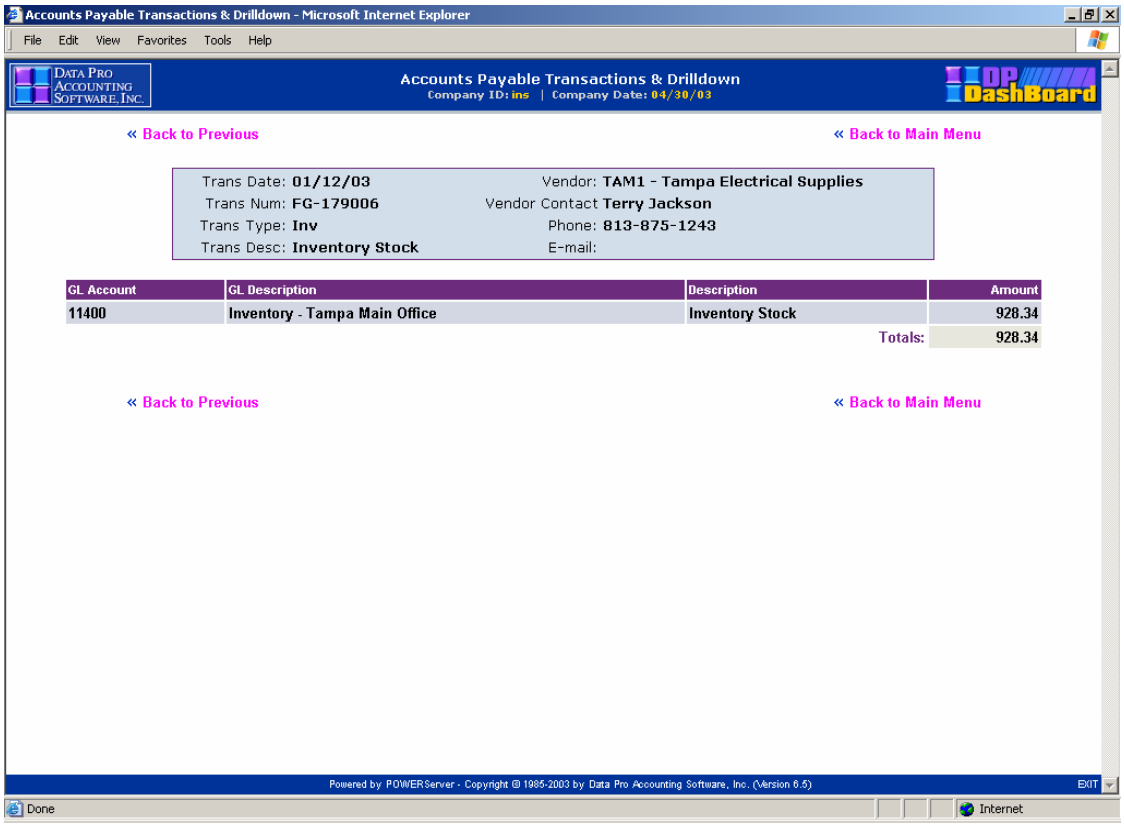


Figure 3-154. Accounts Payable Transactions & Drilldown>General Ledger Accounts Summary Report>Trans # Drilldown Report (example)
2 of 2

The following table describes the **Accounts Payable Transactions General Ledger Accounts Summary** transaction number drilldown report details:

Trans Date	Date of the actual selected transaction.
Trans Num	Number associated with selected transaction.
Trans Type	Describes the type of transaction for the transaction selected. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Description	Describes the purpose of the transaction selected.
Vendor	Name of the supplier/creditor.
Vendor Contact	Name of contact for the supplier/creditor.
Phone	Phone number of the vendor contact.
Email	Email address of the vendor contact.
GL Account	Account number of the associated General Ledger cash account.
GL Description	General description of the transaction selected.
Description	Specific description of the transaction selected.
Amount	Total amount owed to the supplier/vendor for the selected transaction.

Accounts Receivable Aging & Drilldown

This option lists the balances from unpaid invoices or any other money owed to you by your customers. The Accounts Receivable Aging Report is a listing of the customers making up your total accounts receivable balance. Using this report can inform you of any discrepancies in receiving the monies due your firm. It is common to run an accounts receivable aging report at the end of each month.

NOTE

The sum of all your customer accounts receivable is listed as a current asset on your balance sheet.

The following screen illustrates where the **Reports & Drilldowns>Accounts Receivable Aging and Drilldown** option is located on the DP/DashBoard Menu System screen (Figure 3-155).

Figure 3-155. Reports & Drilldowns>Accounts Receivable Aging & Drilldown

To Display an Accounts Receivable Aging & Drilldown Report:

1. In the center of the DP/DashBoard Menu System screen System screen, select the **Accounts Receivable Aging & Drilldown** option from the Reports & Drilldowns section. The Accounts Receivable Aging & Drilldown screen (Figure 3-156) displays.

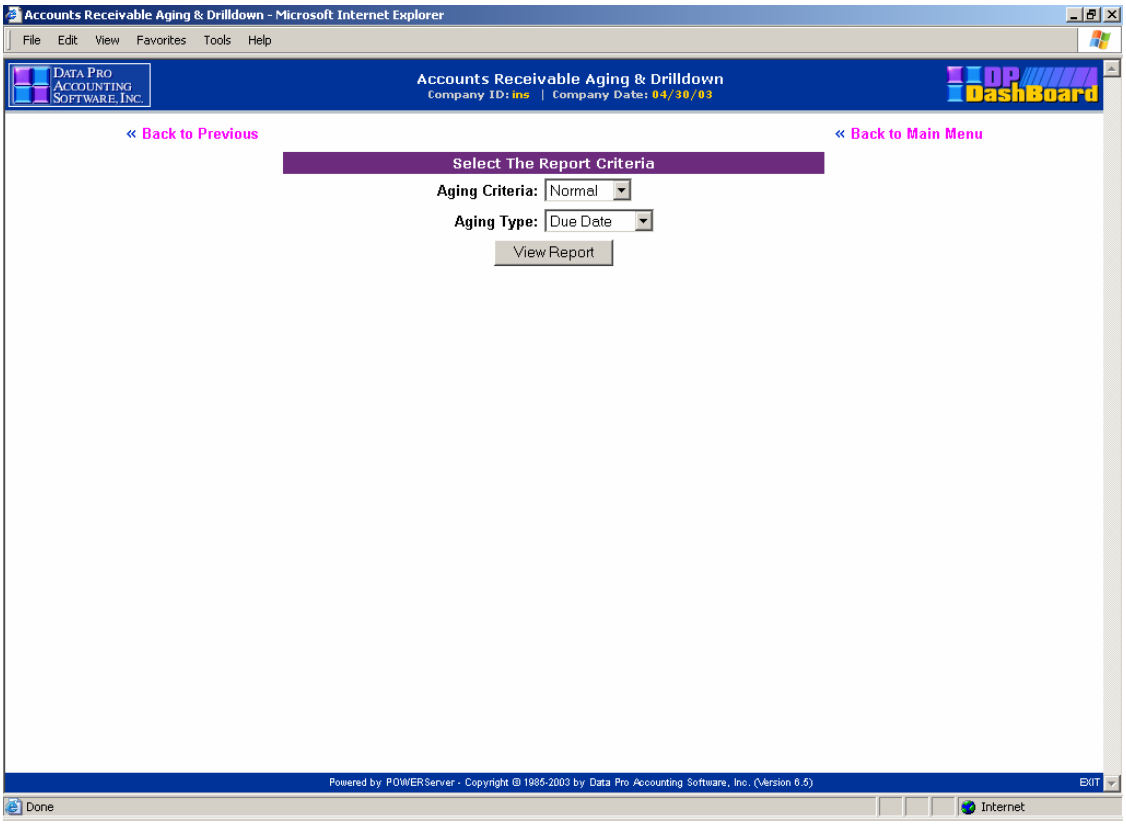


Figure 3-156. Accounts Receivable Aging & Drilldown Screen

2. Select the desired report age (Normal or Past Due) to be run from the **Aging Criteria:** pull-down menu.
3. Select the desired aging type (Due Date or Invoice Date) from the **Aging Type** pull-down menu.
4. <Click> the **View Report** button. The appropriate Aging & Drilldown report (Figure 3-157) displays in the format specified.

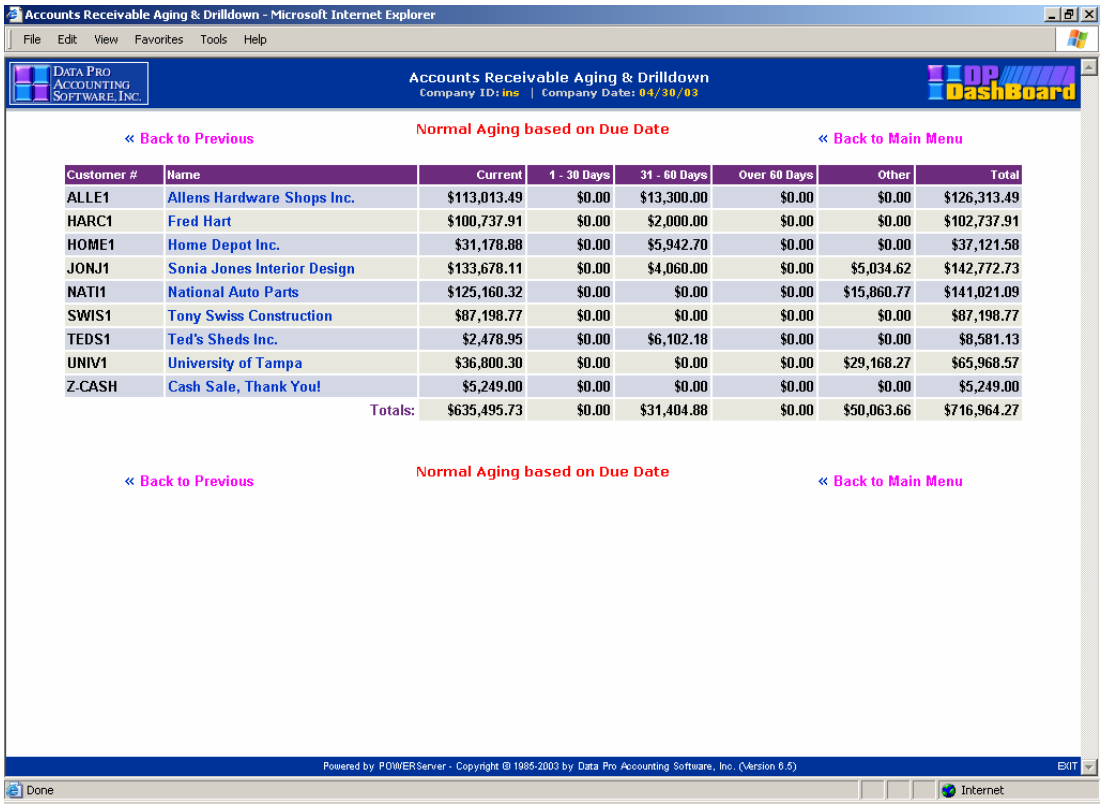


Figure 3-157. Accounts Receivable Aging & Drilldown >Normal-Due Date Aging Report (example)

The following table describes the **Accounts Receivable Aging** report details:

Customer #	Number associated with the Customer Name as defined in the Infinity POWER Accounts Receivable module.
Name	Name of each customer with an accounts receivable balance.
Current Due	Amounts due from customers for sales made during the current month.
1-30 Days	Lists the unpaid amount due from customers for sales made in the previous month. These are the customers with accounts 1 to 30 days past due
31-60 Days	Lists the amounts due from customers for sales made two months prior. These are customers with accounts 31 to 60 days past due.
Over 60	Lists the amount due from customers with accounts over 60 days past due.
Other	Summary column for all other open items that are outside the range of the Define Aging categories.
Total	Displays the total amount owed by the customer.

To Drilldown an Accounts Receivable Aging & Drilldown Report:

1. <Click> a component in the **Name** column (Figure 3-158) of the Normal/Past Due Aging report to drilldown by customer and display the next report level (e.g. Sonia Jones Interior Design). The appropriate Accounts Receivable Aging screen displays depending on the criteria selected (Figure 3-159).

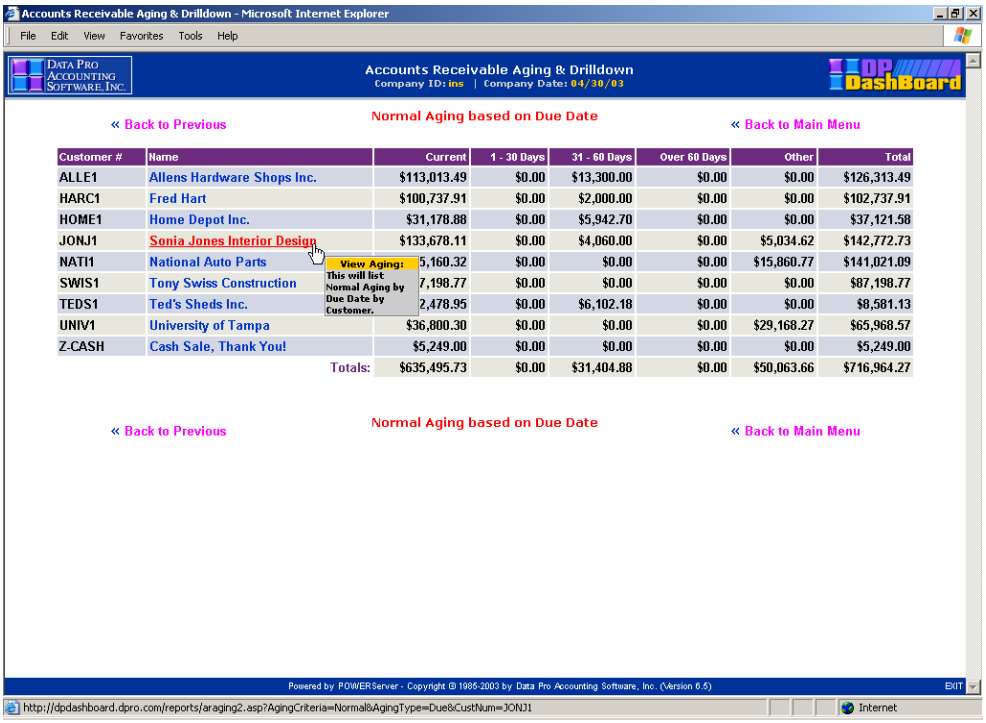


Figure 3-158. Accounts Receivable Aging & Drilldown >Normal-Due Date Aging Report>Customer Drilldown Report (example) 1 of 2

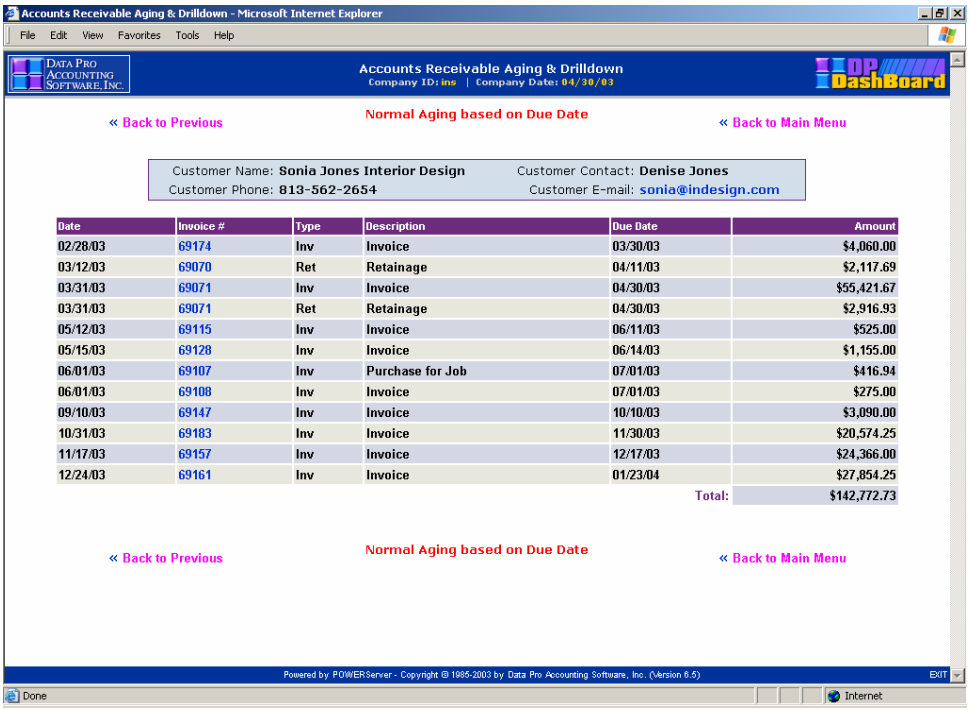


Figure 3-159. Accounts Receivable Aging & Drilldown >Normal-Due Date Aging Report>Customer Drilldown Report (example) 2 of 2

The following table describes the **Accounts Receivable** customer drilldown report details:

Customer Name	Name of the customer.
Customer Phone	Phone number of the customer.
Customer Contact	Name of contact for the customer.
Customer E-mail	E-mail address of the customer contact.
Date	Date of the transaction.
Invoice #	Invoice number associated with the associated customer name. You can drilldown to view detailed transaction data in the format specified for Aging Criteria (Normal or Past Due) and Aging Type (Due Date or Invoice Date).
Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Description	Describes the purchase order number (PO #) associated with the transaction.
Due Date	Date the amount is owed to the specified customer.
Amount	Total amount due the to specified customer.

2. <Click> a component in the **Invoice #** column (Figure 3-160) to drilldown by invoice and display the next report level containing the specified detailed information. The appropriate Accounts Receivable Aging report (Figure 2-161) displays.

NOTE

By clicking on the detail headers, items listed can toggle between ascending and descending order.

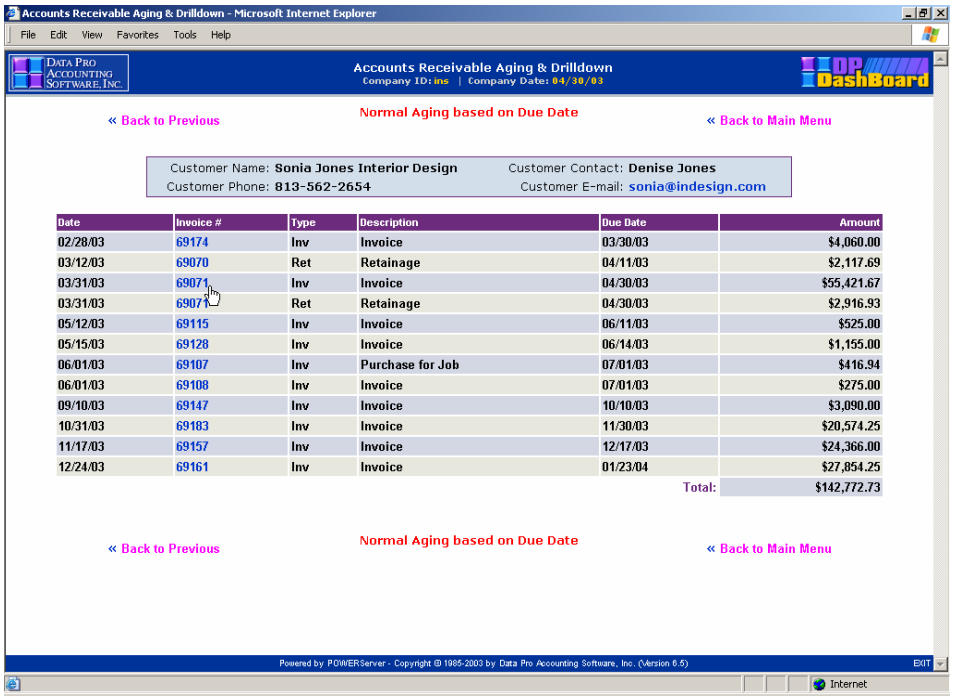


Figure 3-160. Accounts Receivable Aging & Drilldown >Normal-Due Date Aging Report>Customer Drilldown>Invoice # Drilldown Report (example) 1 of 2

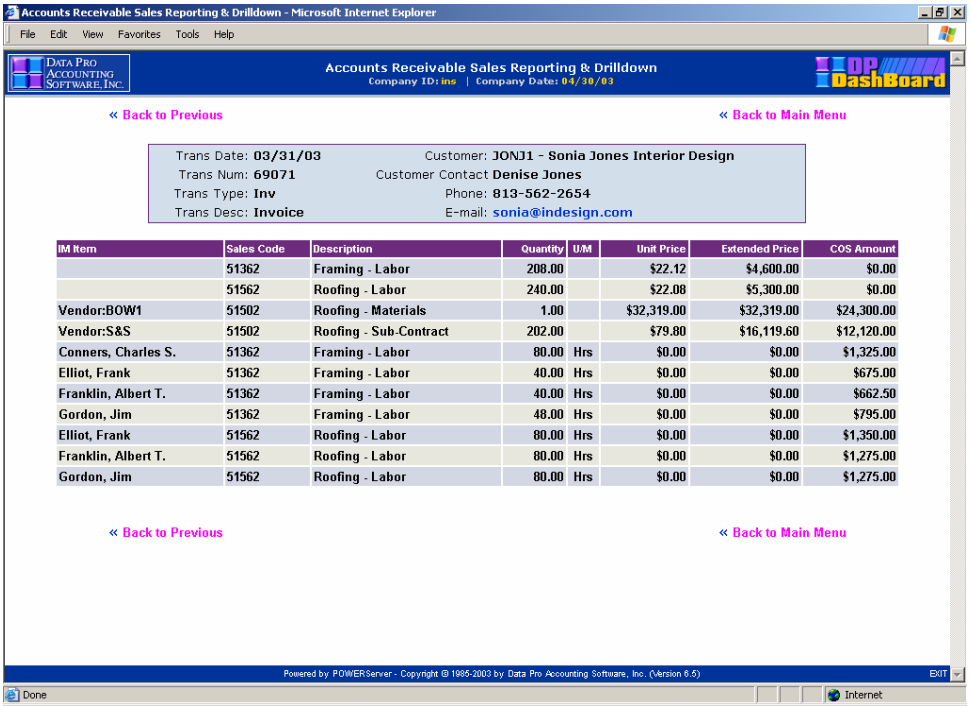


Figure 2-161. Accounts Receivable Aging & Drilldown >Normal-Due Date Aging Report>Customer Drilldown>Invoice # Drilldown Report (example) 2 of 2

IMPORTANT NOTE

If you do **NOT** want certain employees to see the **Cost Amount**, then you need to go into the Infinity POWER Advanced Security Module>Set Up Groups or Users, select By Option, select AR module. Turn off rights to "**Cost Inquiry"**. This will hide the COS Amount column in this drilldown report.

The following table describes the **Accounts Receivable invoice** drilldown report details:

Trans Date	Date of the transaction.
Transaction Num	Transaction number associated with the selected invoice.
Trans Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Desc	Describes the transaction as entered at time of billing.
Customer	Name of the customer.
Customer Contact	Name of contact for the customer.
Phone	Phone number of the customer.
E-mail	E-mail address of the customer contact.
IM Item	Inventory Management item.
Sales Code	Sales code associated with item.
Description	Description of the sale item.
Quantity	Quantity of the item.
U/M	Describes the unit of measure associated with the Quantity column.
Unit Price	Price per unit.
Extended Price	Total price charged for that line item.
COS Amount	Cost of sale amount.

Accounts Receivable Sales Reporting & Drilldown

This option lists the receivable sales history for the active company selected. The Accounts Receivable Sales report provides a breakdown by supplier of all receivable items for a specified date range.

The following screen illustrates where the **Reports & Drilldowns>Accounts Receivable Sales Reporting & Drilldown** option is located on the DP/DashBoard Menu System screen (Figure 3-162).

Figure 3-162. Reports & Drilldowns>Accounts Receivable Sales Reporting & Drilldown

To Display an Accounts Receivable Sales Reporting Drilldown Report:

1. In the center of the DP/DashBoard Menu System screen System screen, select the **Accounts Receivable Sales Reporting & Drilldown** option from the Reports & Drilldowns section. The Accounts Receivable Sales Reporting & Drilldown screen (Figure 3-163) displays.

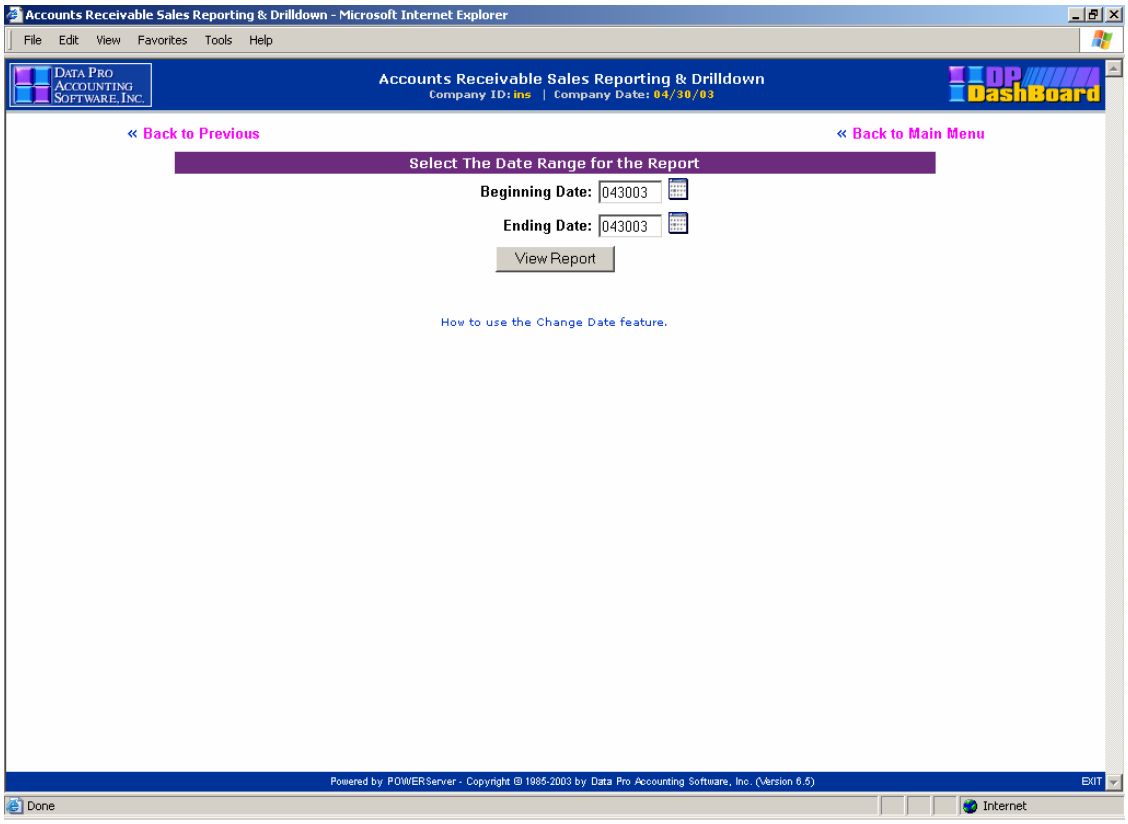


Figure 3-163. Accounts Receivable Sales Reporting & Drilldown Screen

2. <Click> the calendar icon next to the **Beginning Date** display box to open the calendar and select the desired date for the report date range. The calendar closes and the selected beginning date displays. Hint: <Click> on **<<** to change the month or year prior to the current date, or <click> on **>>** to change the month or year after the current date.

3. <Click> the calendar icon next to the **Ending Date** display box to open the calendar and select the desired date for the report date range. The calendar closes and the selected ending date displays. Hint: <Click> on **<<** to change the month or year prior to the current date, or <click> on **>>** to change the month or year after the current date.

4. Select the desired report type (vouchers or checks) from the **Report Type** pull-down menu.

5. <Click the **View Report** button. The Sales Code Summary report (Figure 2-164) displays listing all receivable sales items for the specified date range.

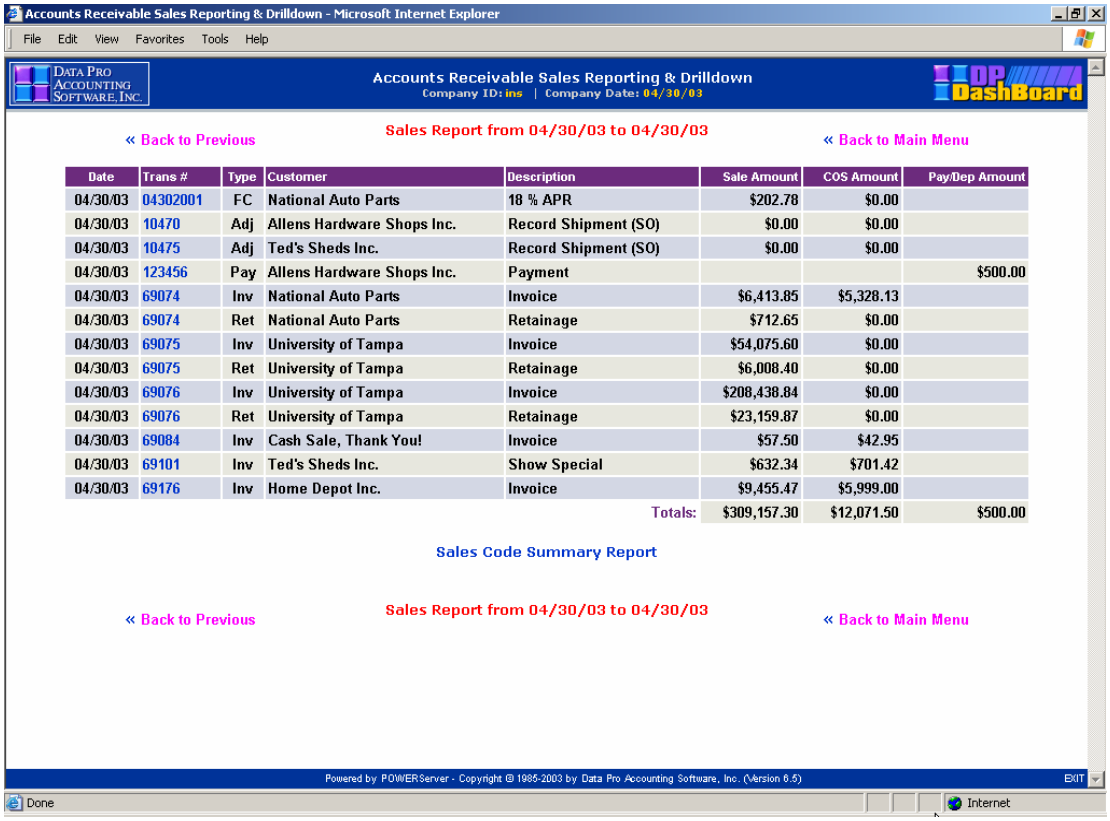


Figure 2-164. Accounts Receivable Sales & Reporting Drilldown >Sales Code Summary Report (example)

The following table describes the **Accounts Receivable Sales & Reporting Drilldown - Sales Code Summary** report details:

Date	Date of each sales transaction listed for the specified date range.
Trans #	Transaction number associated with each sales transaction.
Type	Describes the type of transaction for each one listed. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Customer	Name of the customer associated with each transaction listed.
Description	Describes the purpose of the transaction.
Sales Amount	Amount due from the customer associated with each transaction listed.
COS Amount	Cost of sale amount.
Pay/Dep Amount	Payment amount that has been received by the customer to the associated sales transaction listed.

To Drilldown by Transaction Number:

1. <Click> a component in the **Trans #** column (Figure 3-165) of the Sales Code Summary report to drilldown by transaction number and display the next report level (e.g. 69073.). The Accounts Receivable Sales Reporting & Drilldown screen (Figure 3-166) displays with details on the selected transaction.

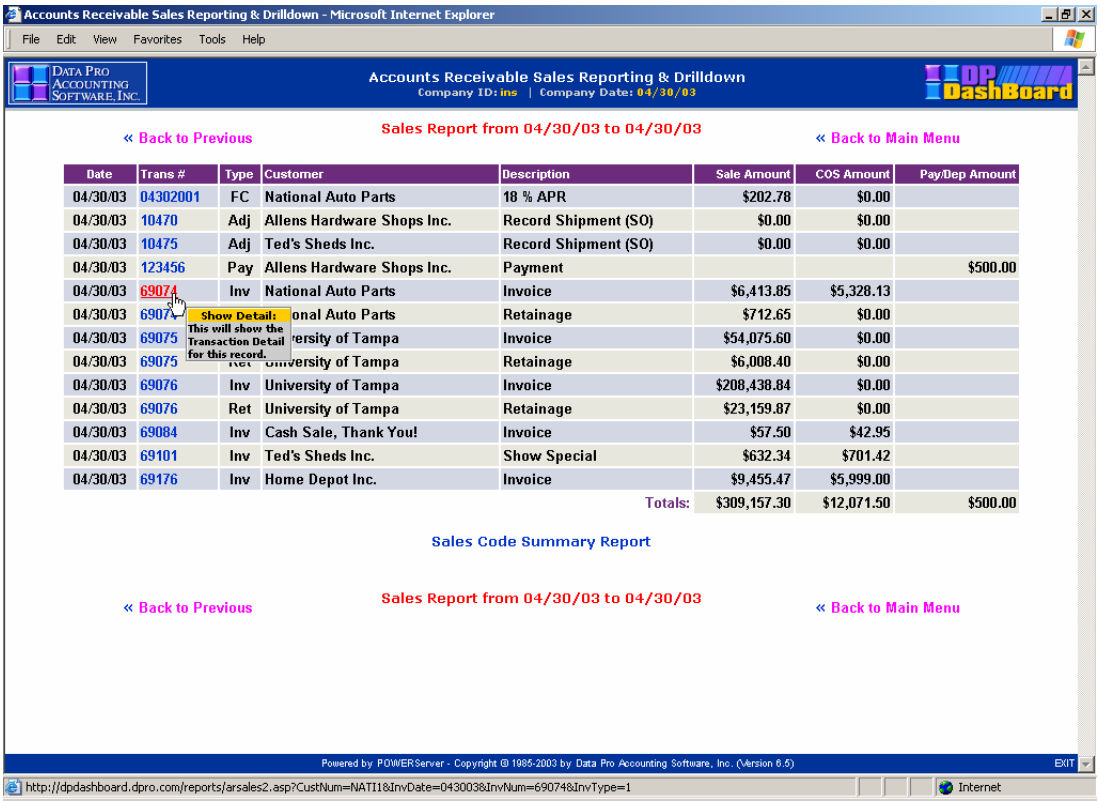


Figure 3-165. Accounts Receivable Sales & Reporting Drilldown >Sales Code Summary Report>Trans # Drilldown Report (example)
1 of 2

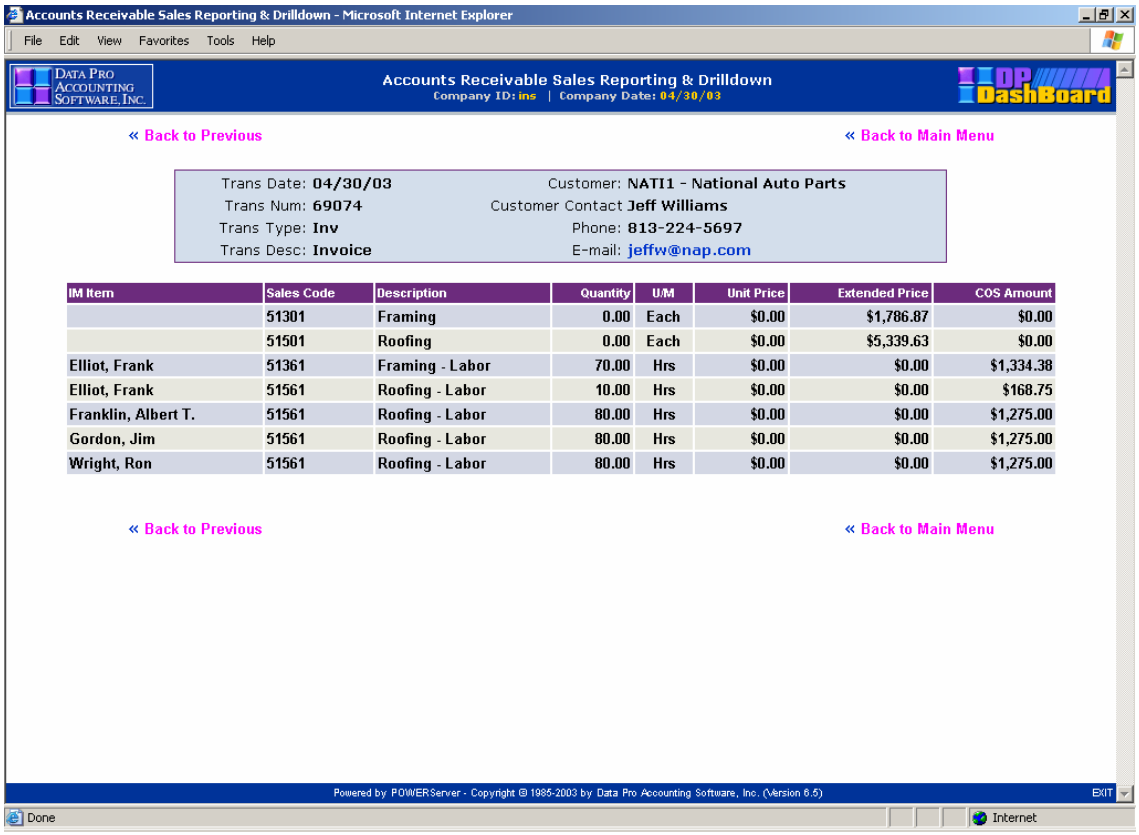


Figure 3-166. Accounts Receivable Sales & Reporting Drilldown >Sales Code Summary Report>Trans # Drilldown Report (example)
2 of 2

The following table describes the **Accounts Receivable Sales Code Summary** report transaction number drilldown report details:

Trans Date	Date of the transaction.
Transaction Num	Transaction number associated with the selected invoice.
Trans Type	Describes the transaction type that is defined when creating the initial transaction. Transaction types include: invoice, credit memo, debit memo, adjustment, statement, finance charges, retainage, deposit/advance, and payment – check.
Trans Desc	Describes the transaction as entered at the time of billing.
Customer	Name of the customer.
Customer Contact	Name of contact for the customer.
Phone	Phone number of the customer.
Email	Email address of the customer contact.
IM Item	Inventory Management item.
Sales Code	Code associated with the selected transaction.
Description	Describes the sale transaction (e.g. Contract Labor).

Quantity	Describes the cost per item or cost of service for each transaction listed. Display the **"quantity"** based on the Accounts Receivable Master Configuration settings
U/M	Describes the unit of measure associated with the Quantity column.
Unit Price	Price per unit purchased. Displays the **"unit price decimal places"** based on the Accounts Receivable Master Configuration settings.
Extended Price	Total price charged for that line item.
COS Amount	Cost of sale amount.
Amount	Total amount due from the customer for the selected transaction.

CUSTOMER SUPPORT

The Customer Support Management menu options from the **DP/DashBoard** Menu System screen, allow you to access and keep track of customer support traffic. Ticklers, support tickets, and customer profiles can be added, changed, and accessed from this main menu function. This assumes, however, that you have purchased and installed the Infinity POWER Accounts Receivable (A/R) module (P/N 104). Otherwise, most of these features will not be available.

These features are accessible in the **Customer Support** section of the **DP/DashBoard** Menu System screen (**Error! Reference source not found.**).

Figure 3-167. Customer Support Main Menu Options

Review/Add Ticklers

Ticklers are a handy way to keep track of customer support requests. When a customer calls in with a question or problem, an operator can create a tickler describing the issue at hand. This creates a record of that customer request, which can be accessed at any time for reference. While entering the tickler information, an operator has access to the customer's payment history, past due aging history, as well as previously taken notes on the customer (assuming the A/R module is installed).

The following screen illustrates where the **Reports & Drilldowns>Review/Add Ticklers** option is located on the **DP/DashBoard** Menu System screen (Figure 2-168).

Figure 2-168. Reports & Drilldowns>Review/Add Ticklers

To Review a List of Ticklers:

1. In the center of the **DP/DashBoard** Menu System screen (**Error! Reference source not found.**), select the **Review/Add Ticklers** option from the Customer Support section. The Review/Add Support Ticklers screen (Figure 3-169) displays listing existing tickler information.

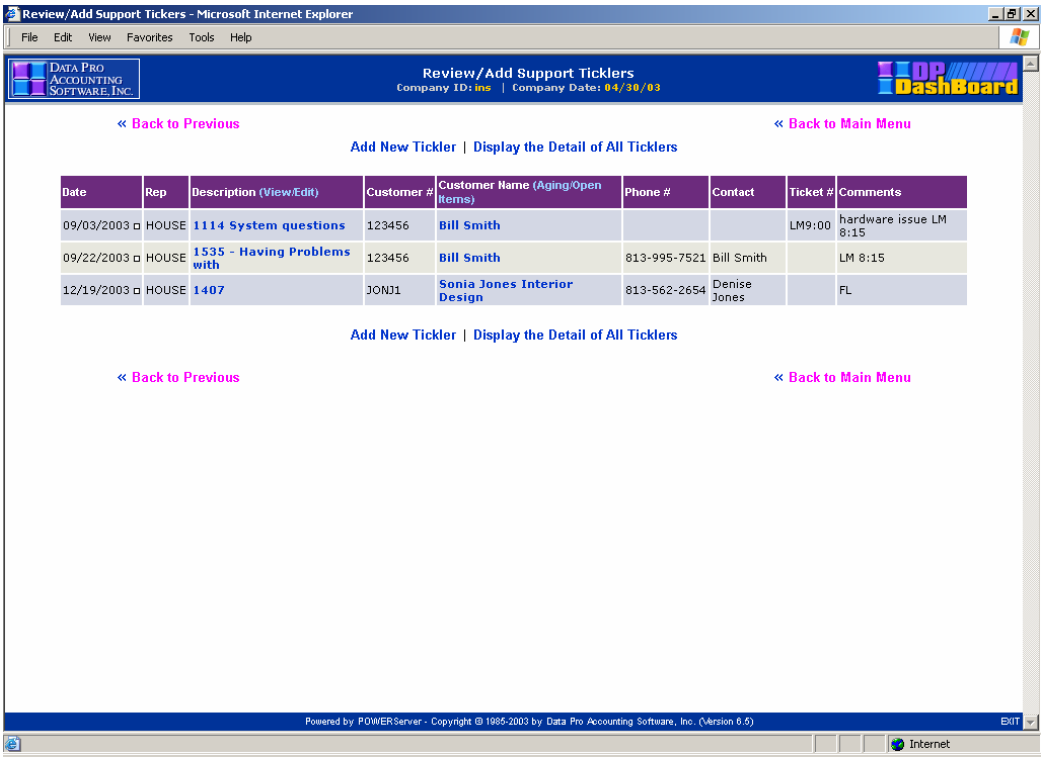


Figure 3-169. Review/Add Support Ticklers Screen

The following table describes the **Review/Add Support Ticklers** screen details:

Date	Date tickler was created.
Rep	Describes which representative created the tickler.
Description (View/Edit)	Describes the customer problem or request. Clicking a component in this column opens the Add/Change Tickler screen.
Customer #	Identifying alpha/numeric characters associated with a customer name. Created when a new customer is added to the Accounts Receivable module.
Customer Name (Aging/Open Items)	Description of customer that reported the problem or request. Clicking a component in this column displays the Customer Aging/Open Items window. This lists the aging history of open items for the specified customer.
Phone #	Customer's phone number.
Contact	Name of the main contact person for the customer account.
Ticket #	System generated number associated with the support ticket.
Comments	Describes any additional, relevant details pertaining to the tickler.

2. <Click> the **Display the Detail of All Ticklers** option to review specific details on all open ticklers.

To Add a New Tickler:

This option allows you to create a new customer support tickler.

1. From the **Review/Add Support Ticklers** screen (Figure 3-169), <click> the **Add New Tickler** option. The Select Customer by Number, Name or Phone screen (Figure 3-170) displays.

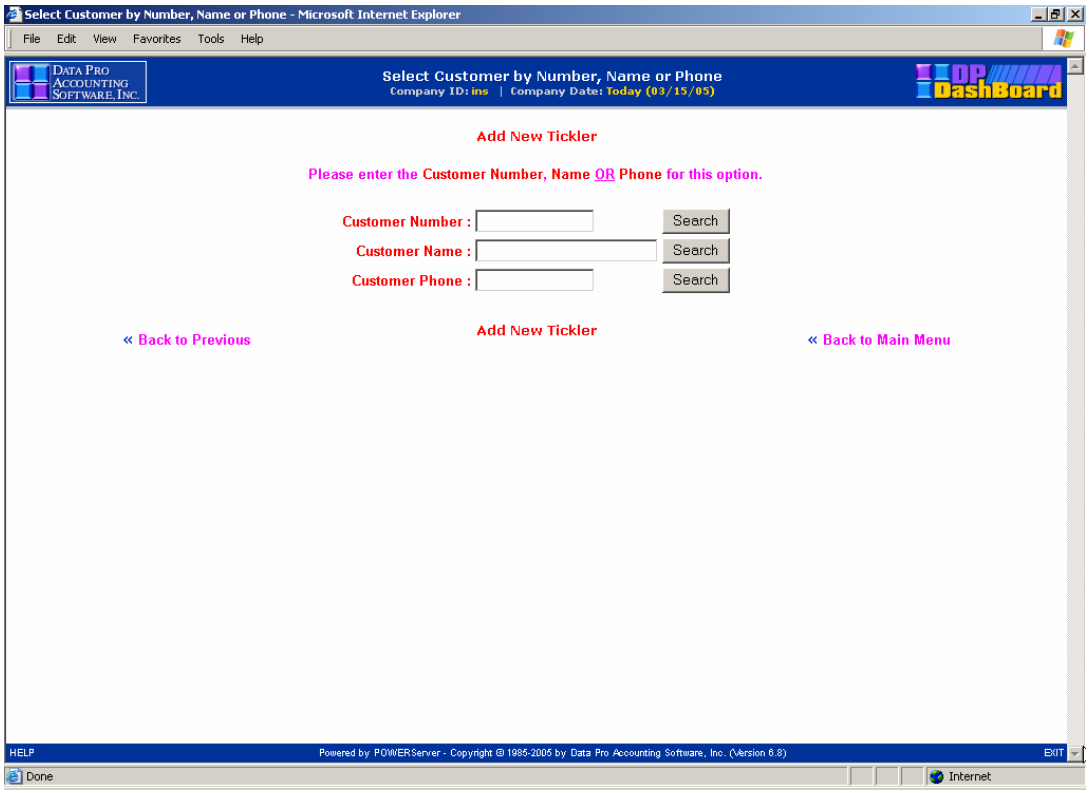


Figure 3-170. Select Customer by Number, Name or Phone Screen

2. Perform one of the following search options:
   a. Enter the assigned customer number in the **Customer Number** text box.

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER program.

OR

   b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

OR

c. Enter the phone number of the customer in the **Customer Phone** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

NOTE

The customer phone number must be entered exactly as it is defined in the Infinity POWER program.

3. <Click> the **Search** button. The Add/Change Tickler screen (Figure 3-171) displays providing all the known customer information in the appropriate fields.

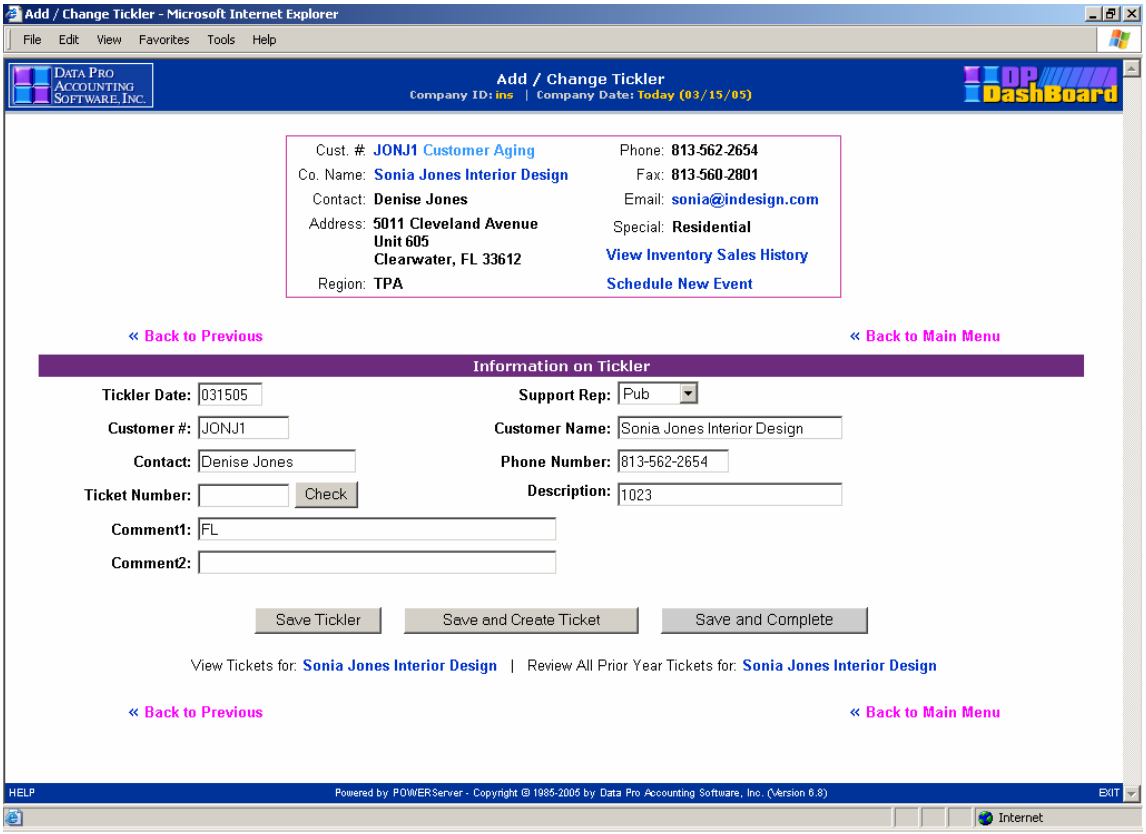


Figure 3-171. Add/Change Tickler Screen

The following table describes the **Add/Change Tickler** screen details:

Upper Section	
Cust. #	Number associated with the Customer. Clicking the actual customer number displays a complete payment history report for that customer which can be printed on demand. Clicking the Customer Aging option displays an aging report for that customer.
Co. Name	Name of the customer. Clicking on this option opens a View/Add notes window for that customer which can be printed on demand. New notes may also be entered at this point in the program.
Contact	Name of main contact person for the customer account.
Address	Mailing or Physical address of the company (Bill to Address:).
Region	5-digit alpha/numeric text string defining the region the customer is located.
CON Min	Minutes available in customer's technical support contract.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in **"special"** user defined field stored in each customer's mater record. The title of this field can vary depending on whether the user renamed this field in the A/R master configuration.
View Inventory Sales History	Opens the Customer Inventory Sales History screen. All invoices related to the selected customer are displayed. From here you can select a specific invoice to drilldown the transaction details.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.
Lower section	
Tickler Date	Date tickler was created.
Customer #	Number associated with the customer whom the tickler has been created.
Contact	Name of contact person for the customer.
Ticket Number	Number assigned to support ticket if one is created for that tickler.
Check	Click the check button to get status on a support ticket generated for that tickler.
Comment 1	Alpha/numeric text box (max of 50 characters). Enter important details regarding of the nature of the problem or request. Displays in the Comments column of the Review/Add Support Ticklers screen.
Comment 2	Alpha/numeric text box (max of 50 characters). Enter a description of the nature of the problem or request. This is displayed in the Open Support Ticklers window when the Display the Details of All Ticklers option is selected.
Support Rep	Describes the type or which support rep generated the tickler (e.g. public relations, in-house, etc)

Customer Name	Name of the customer.
Phone Number	Phone number of the customer.
Description	Describes the nature of the problem or request from the customer. Displays in the Description column of the Review/Add Support Ticklers screen.

4. Enter a description of the problem or request in the **Comments** text box.
5. Make any desired changes to the default information in the **Customer Information** section (e.g. the customer may now have a different contact person or phone number).
6. <Click> one of the following buttons to save the tickler:
   a. <Click> the **Save Tickler** button. Add/Change Tickler screen closes and returns to the Review/Add Ticklers screen (Figure 3-169). The new tickler is now added to this screen.

   OR

   b. <Click> the **Save and Create Ticket** button to save the tickler and create a new customer support ticket. The Change/Add Ticket screen (

   Figure 3-177) displays (see the To Add a Customer Support Ticket section).

   OR

   c. <Click> the **Save and Complete** button to save the tickler and close it out. The tickler is removed from the list of ticklers in the Review/Add Support Ticklers screen (Figure 3-169).

To Review Tickler Details:

This option allows you to view the complete details for each tickler.

1. From the **Review/Add Support Ticklers** screen (Figure 3-169), <click> the **Display the Detail of All Tickers** option. The Open Support Ticklers screen (Figure 3-172) displays listing all details.

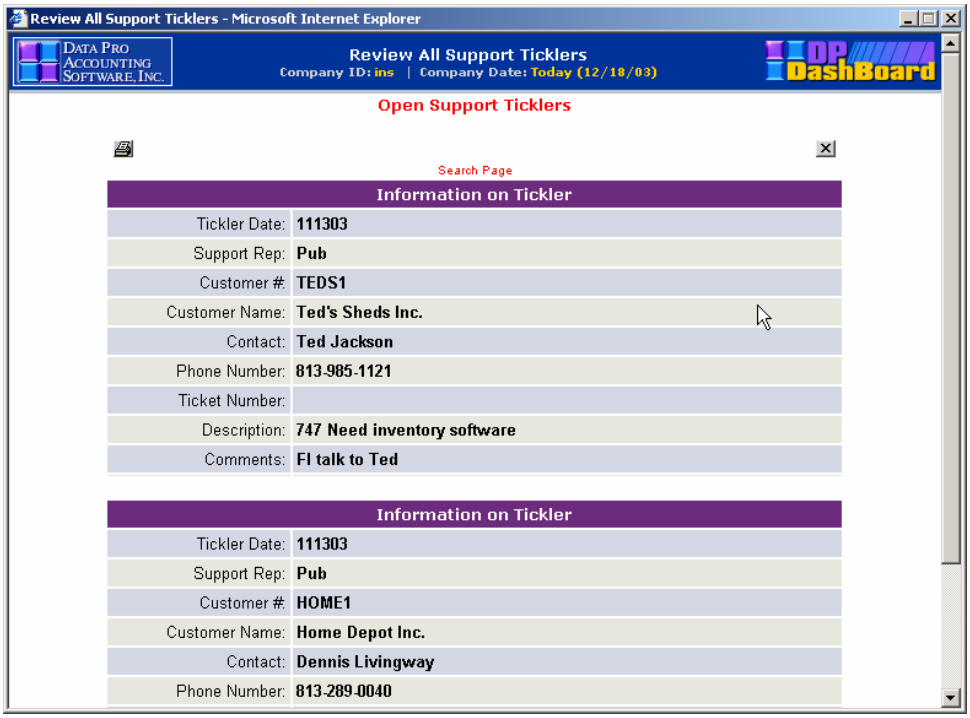


Figure 3-172. Open Support Ticklers screen

NOTE

To quickly find details on a specific tickler, use the **Search Page** option to perform a keyword search on this screen.

2. <Click> the icon to print the details for all open ticklers.
3. <Click> the icon to return to the Review/Add Support Ticklers screen (Figure 3-169).

To Modify a Tickler:

This function allows you to make changes to existing ticklers in the Information on Tickler section of the Add/Change Tickler screen (Figure 3-171).

1. From the Review/Add Support Ticklers screen, <click> the desired component in the **Description** column to open the tickler to be modified. The Add/Change Tickler screen displays (Figure 3-171).
2. Make any desired changes to the **Customer Information** section (e.g. the customer may now have a different contact person).
3. <Click> one of the following buttons to save the modifications to the tickler:
   a. <Click> the **Save Tickler** button. Add/Change Tickler screen (Figure 3-171) closes and returns to the Review/Add Ticklers screen. The new tickler is now added to this screen.

   OR

   b. <Click> the **Save and Create Ticket** button to save the tickler and create a new customer support ticket. The Save/Add Ticket screen displays (see the following section, Review/Add Customer Support Tickets).

   OR

   c. <Click> the **Save and Complete** button to save the tickler and close it out. The tickler is removed from the list of ticklers in the Review/Add Support Tickets screen (Figure 3-169).

NOTE

When a tickler is removed from the list of open ticklers, it still remains in the **DP/DashBoard** system. The history can be retrieved for a specified customer only if it has been converted to a support ticket. Support tickets may be billable to a customer or not (i.e. warranty or pre-sale inquiries).

Review/Add Customer Support Tickets

Customer Support tickets are generated when the decision has been made that it is necessary to take action to satisfy a tickler. The time of each support call is recorded to manage billable support issues or for better call tracking purposes.

The following screen illustrates where the **Reports & Drilldowns>Review/Add Customer Support Tickets** option is located on the **DP/DashBoard** Menu System screen (Figure 3-173).

Figure 3-173. Reports & Drilldowns>Review/Add Customer Support Tickets

To Review a Customer Support Ticket:

This option allows you to review the support ticket history for a specified customer. You have the option of viewing all the tickets or just tickets from the prior year.

1. In the center of the **DP/DashBoard** Menu System screen (**Error! Reference source not found.**), select the **Review/Add Customer Support Tickets** option from the Customer Support section. The Select Customer by Number, Name or Phone screen (Figure 3-174) displays.

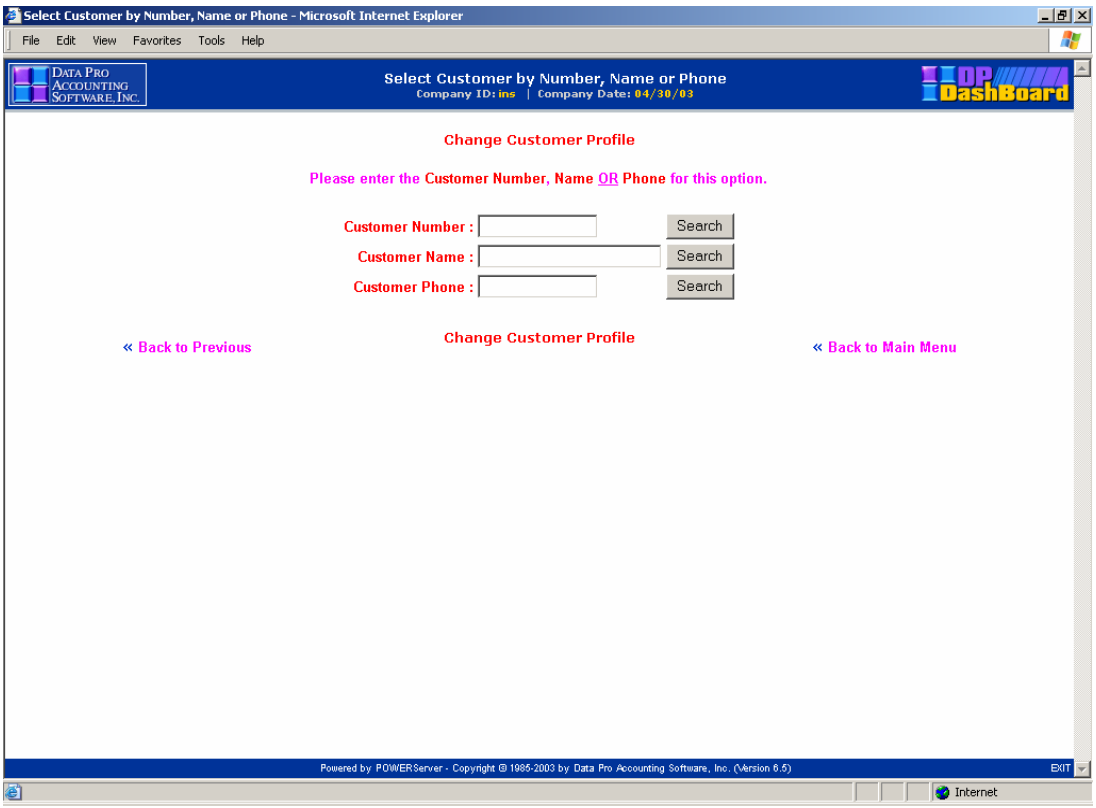


Figure 3-174. Select Customer by Number, Name or Phone Screen – Review Add Customer Support Tickets

2. Perform one of the following search options:

   a. Enter the assigned customer number in the Customer Number text box. <Click> the Search button. The Review Customer Support tickets screen displays (Figure 3-243) listing any tickets.

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER program.

OR

   b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

OR

   c. Enter the phone number of the customer in the Customer Phone text box. The Search Customer screen displays. <Click> the desired customer from the Name column of the Customer Information list. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

NOTE

The customer phone number must be entered exactly as it is defined in the **Infinity POWER** program.

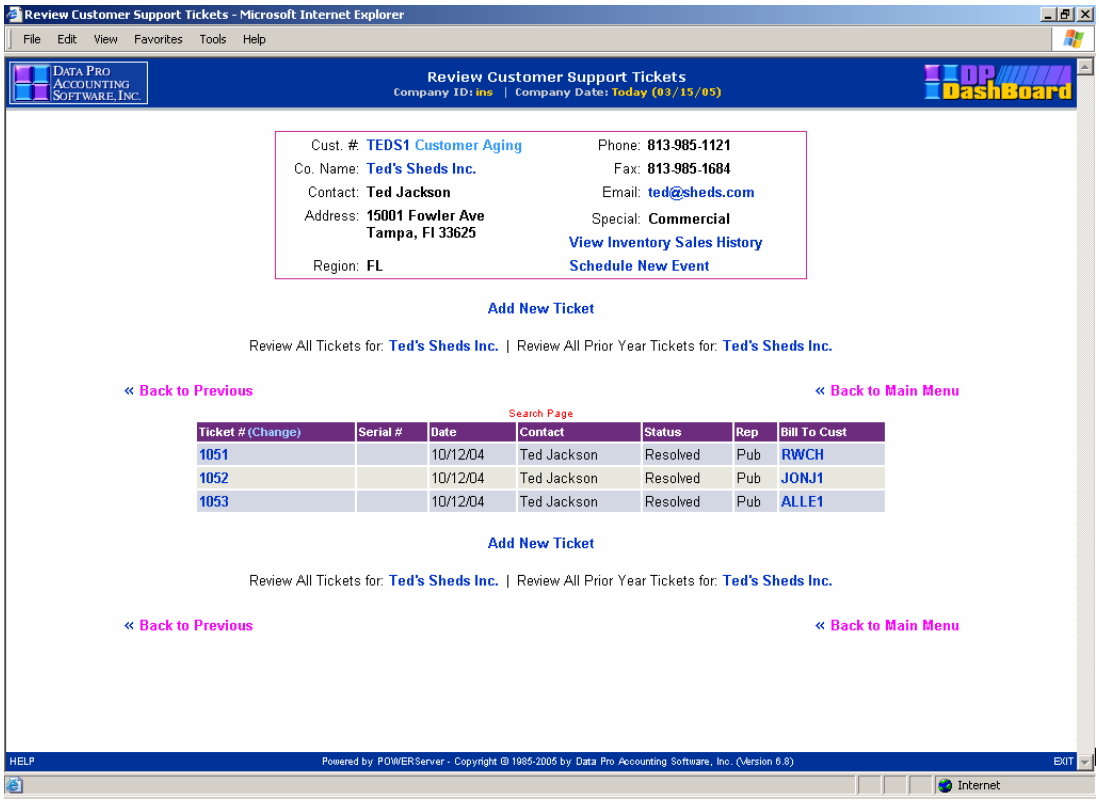


Figure 3-175. Review Customer Support Tickets Screen

The following table describes the **Review Customer Support Tickets** screen details:

Cust. #	Number associated with the Customer. Clicking the actual customer number displays a payment history report for that customer. Clicking the Customer Aging option displays an aging report for that customer.
Co. Name	Name of the customer. Clicking on this option opens a View/Add notes window for that customer. Adding notes may be done through this option.
Contact	Name of the main contact person for the customer account..
Address	Mailing or Physical address of the company (Bill To Address).
Region	5-digit alpha/numeric text string defining the region the customer is located.
CON Min	Minutes available in customer's technical support contract.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in **"special"** user defined field stored in each customer's mater record. The title of this field can vary depending on whether the user renamed this field in the A/R master configuration.
View Inventory Sales History	Opens the Customer Inventory Sales History screen. All invoices related to the selected customer are displayed. From here you can select a specific invoice to drilldown the transaction details.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.
Add New Ticket	Displays the Change/Add Ticket screen.

3. <Click> the **Review All Tickets For** option to display the entire history of customer support tickets for the specified customer. The Review All Customer Support Tickets window (Figure 3-176) displays.

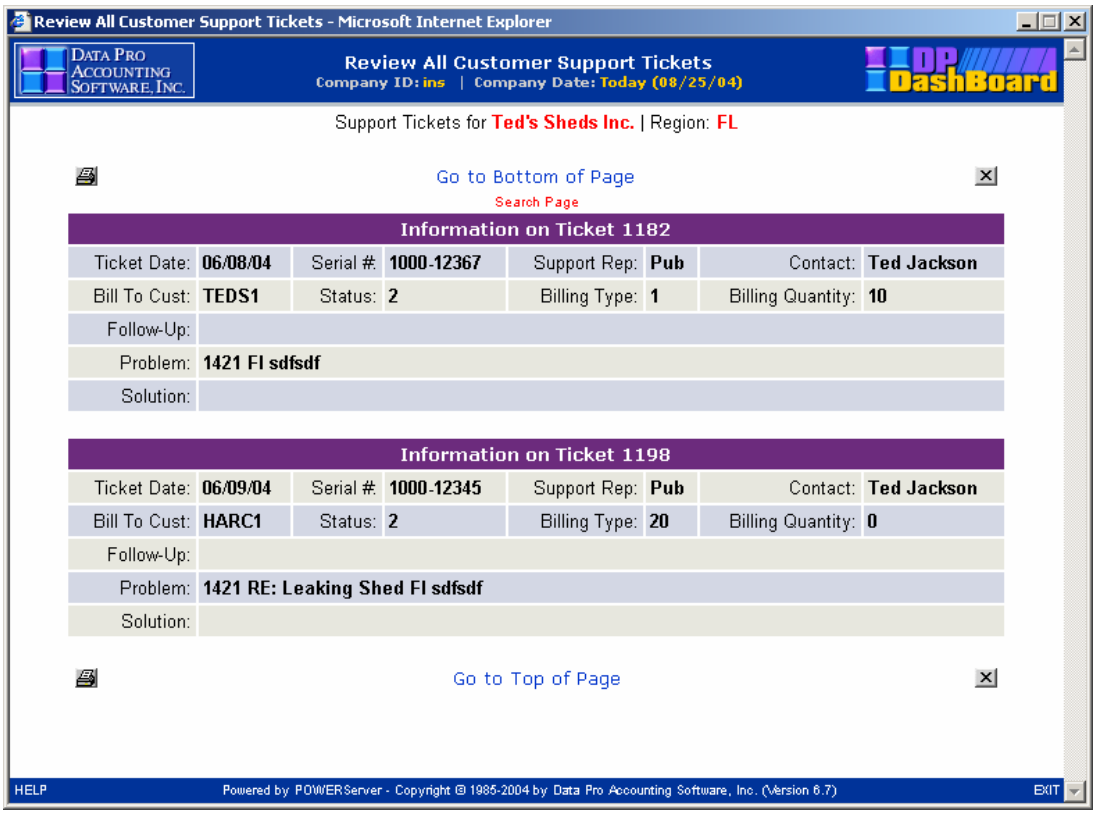


Figure 3-176. Review All Customer Support Tickets Screen

4. <Click> the icon to print the customer support ticket history.
5. <Click> the icon to close this window and return to the Review Customer Support Tickets screen (Figure 3-175).
6. <Click> the **Review All Prior Year Tickets For** option to display the history of support tickets from the prior year only for the specified customer. The Review Customer Support Tickets for Prior Year window displays.
7. <Click> the icon to print the customer support ticket history for the prior year.
8. <Click> the icon to close this window and return to the Review Customer Support Tickets screen (Figure 3-175).

To Add a Customer Support Ticket:

1. In the center of the **DP/DashBoard** Menu System screen (Figure 3-235), select the **Review/Add Customer Support Tickets** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays (Figure 3-174).
2. Perform one of the following search options:
   a. Enter the assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER program.

OR

b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

OR

c. Enter the phone number of the customer in the **Customer Phone** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

NOTE

The customer phone number must be entered exactly as it is defined in the Infinity POWER program.

3. <Click> the **Add New Ticket** option. The Change/Add Ticket screen displays (Figure 3-177) listing customer contact.

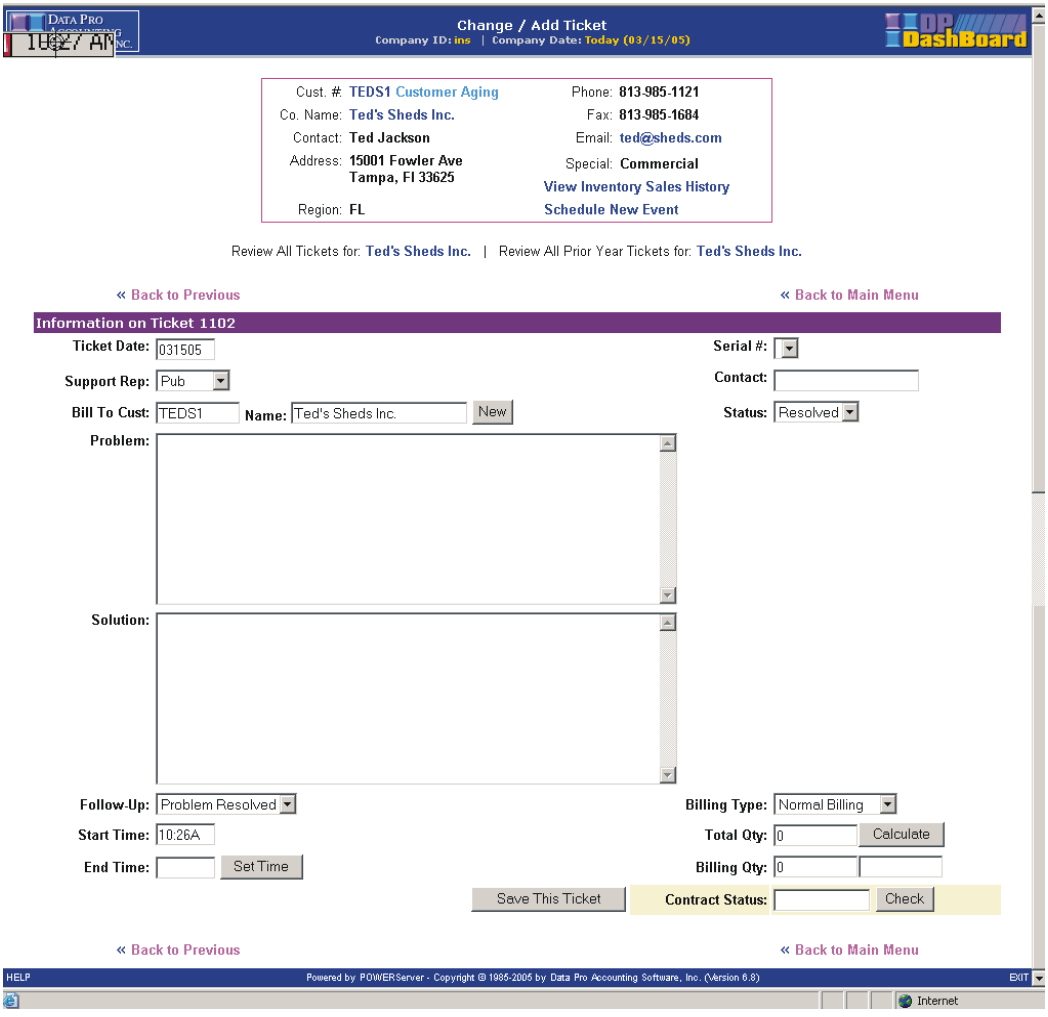


Figure 3-177. Change/Add Ticket Screen (expanded to show all details)

The following table describes the **Change/Add Tickets** screen details:

Cust. #	Number associated with the Customer. Clicking the actual customer number displays a payment history report for that customer. Clicking the Customer Aging option displays an aging report for that customer.
Co. Name	Name of the customer. Clicking on this option opens a View/Add notes window for that customer. Previously written notes on that customer can be viewed, or new ones can be added.
Contact	Name of the main contact person for the customer account.
Address	Mailing or Physical address of the company (Bill to Address).
Region	5-digit alpha/numeric text string defining the region the customer is located.
CON Min	Minutes available in customer's technical support contract.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in **"special"** user defined field stored in each customer's mater record. The title of this field can vary depending on whether the user renamed this field in the A/R master configuration.
View Inventory Sales History	Opens the Customer Inventory Sales History screen. All invoices related to the selected customer are displayed. From here you can select a specific invoice to drilldown the transaction details.
Schedule New Event	Selecting this option opens the Scheduling New Event window. This option allows you to add either private or public events to the calendar.
Ticket Date	Take new ticket is generated. Defaults to current date.
Support Rep	Name of the support representative that handled the customer call.
Bill to Cust	Defines the Customer #. Defaults to the number assigned to that customer.
Name	Name of Customer.
New	Click the New button if this call should be changed to another customer's account. Therefore the support can be provided to one customer and billed to another.
Serial:	This is the serial number of a product the call should be tracked against. These serial numbers are setup in the Customer Support Management application.
Contact	Name of the contact person who reported the problem or request.
Status	Describes the status of the support ticket as either Open, Resolved, or Updated.
Problem	Enter a description of the problem or request from the customer.
Solution	Enter a description of the solution if the issue is solved.
Follow Up	Describes follow up procedures for the support ticket. Pull-down menu options are Problem Resolved or Call Back.

Start Time	Start time of the support call at the point the decision is made to create a ticket.
End Time	End time of the support call. Click the Set Time button to have the system automatically enter the ending time.
Billing Type	Describes the method of billing that will be applied to the customer.
Total Qty	Click the Calculate button to calculate the total billable time for the support call. Time is based on the start time and end time of the call.
Billing Qty	Calculates the billing amount to be applied to the customer.
Contract Status	Status of the customer technical support contract. EXP shows the customer has expired their pre-paid technical support minutes. Clicking the check button will force a search for a current update to this field.

4 Select your name/initials from the **Support Rep** pull-down menu to identify you created the support ticket.

5. Enter the customer contact person reporting the problem or request in the **Contact** text box.
6. <Click> the **Contract Status Check** button at the bottom right of the screen to determine if the customer has either an active, close to expiring, or expired contract.

NOTE

It is recommended to check the status of the contract in the beginning of the call so that the customer can purchase additional support minutes if necessary.

7. Enter a detailed description of the problem or request in the **Problem** text box.
8. Enter a detailed description of the recommended solution in the **Solution** text. In both cases, remember to be thorough. Many times these entries can be the only history of what occurred and could be used in legal disputes.
9. Select the appropriate category from the **Status** and Follow-Up: pull-down menus.
10. When the call is complete, click the **Set Time** button to record the end time of the customer support call. The current time displays in the End Time display box.
11. Select the appropriate method of billing to be applied to the customer from the **Billing Type** pull-down menu.
12. <Click> the **Calculate** button to automatically calculate the total minutes of the support call. The Billing Qty: text box displays the amount calculated in the Total Qty: text box and applies the specified billing rate per minute 3.5 for $3.50/minute).

NOTE

The billing rate depends on the status of the contract. You can manually change this rate by entering a new rate in place of the default rate.

13. Click the **Save This Ticket** button. A confirmation message displays that the support ticket record has been updated and returns to the Customer Support Ticket screen, which now displays the new ticket.

To Change a Customer Support Ticket:

1. In the center of the **DP/DashBoard** Menu System screen (**Error! Reference source not found.**), select the **Review/Add Customer Support Tickets** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays (Figure 3-174).
2. Perform one of the following search options:

a. Enter the assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER A/R module.

OR

b. Enter the full or partial name of the customer in the **Customer Name** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

OR

c. Enter the phone number of the customer in the **Customer Phone** text box. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Review Customer Support Tickets screen displays (Figure 3-175) listing any tickets.

NOTE

The customer phone number must be entered exactly as it is defined in the Infinity POWER program.

3. In the **Ticket #** column, <click> on the ticket you want to change. The Change/Add Ticket screen displays (Figure 3-177) listing details on the support ticket specified.
4. Make any desired changes to the ticket information.
5. <Click> the **Save This Ticket** button.

NOTE

Changes cannot be made to tickets that have had their status changed to **"updated."**

Search for Customer Support Ticket

This option allows you to search for a customer support ticket by entering the associated ticket, customer, or serial number. You can also search by keyword.

The following screen illustrates where the **Reports & Drilldowns>Search for Customer Support Ticket** option is located on the **DP/DashBoard** Menu System screen (Figure 3-178).

Figure 3-178. Reports & Drilldowns>Search for Customer Support Ticket

To Search for a Customer Support Ticket:

1. In the center of the **DP/DashBoard** Menu System screen (**Error! Reference source not found.**), select the **Search for Customer Support Ticket** option from the Customer Support section. The Search for Support Ticket screen displays (Figure 3-179).

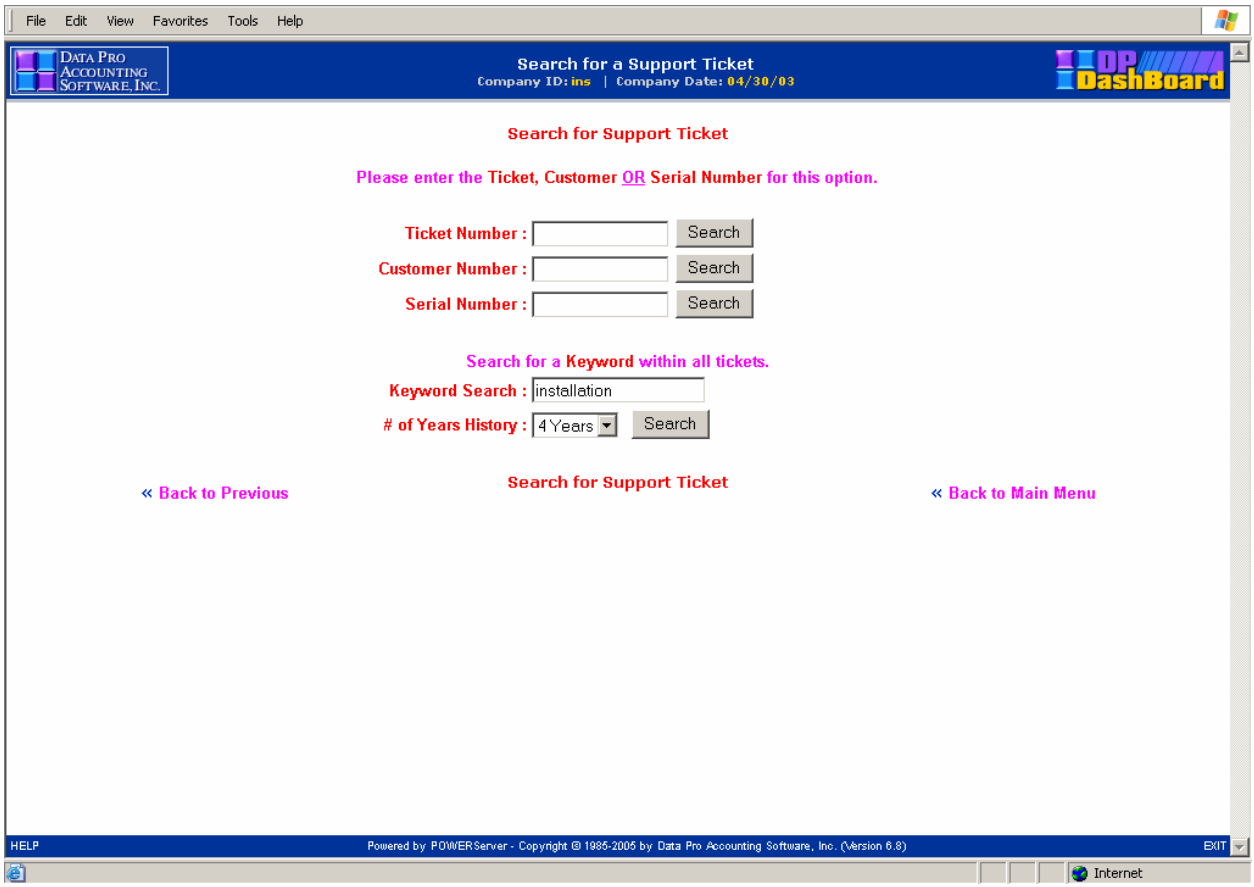


Figure 3-179. Search for Support Ticket Screen

2. Perform one of the following seach options:
   a Enter the appropriate information in the **Ticket Number**, **Customer Name**, or **Serial Number** text box.

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER A/R module.

OR

   b. Enter a keyword in the **Keyword Search** text box and select the desired duration from the **# of Years History** pull-down menu.
3. <Click> the corresponding **Search** button. The Ticket Information screen displays (Figure 3-180) listing all the associated support tickets.

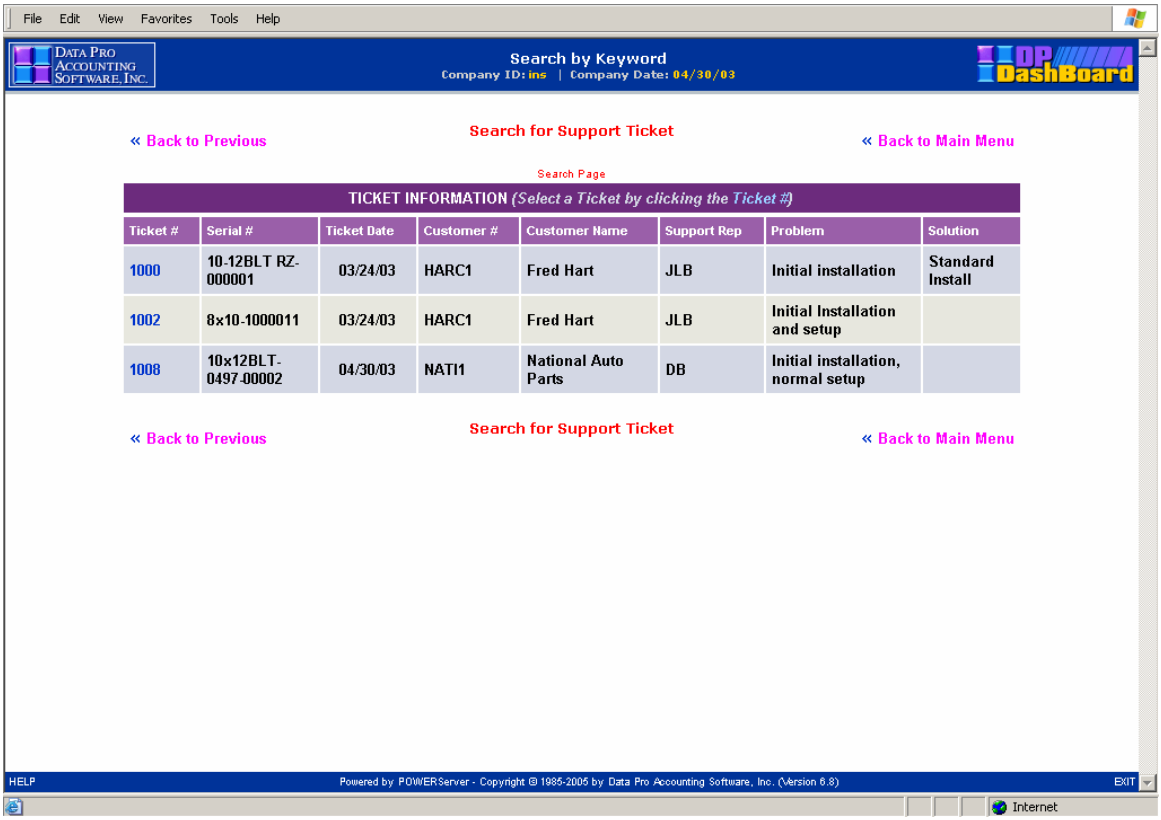


Figure 3-180 Ticket Information Screen

4. Select the desired support ticket listed in the **Ticket #** column. The details of the selected support ticket display.

Change Customer Profile

Profile information on customers can be modified, if necessary. This function also allows you to view a specific customer's aging history, payment history, or add detailed notes.

The following screen illustrates where the **Reports & Drilldowns>Change Customer Profile** option is located on the **DP/DashBoard** Menu System screen (Figure 3-181).

Figure 3-181. Reports & Drilldowns>Change Customer Profile

To Change a Customer Profile:

1. In the center of the **DP/DashBoard** Menu System screen (**Error! Reference source not found.**), select the **Change Customer Profile** option from the Customer Support section. The Select Customer by Number, Name or Phone screen displays (Figure 3-182).

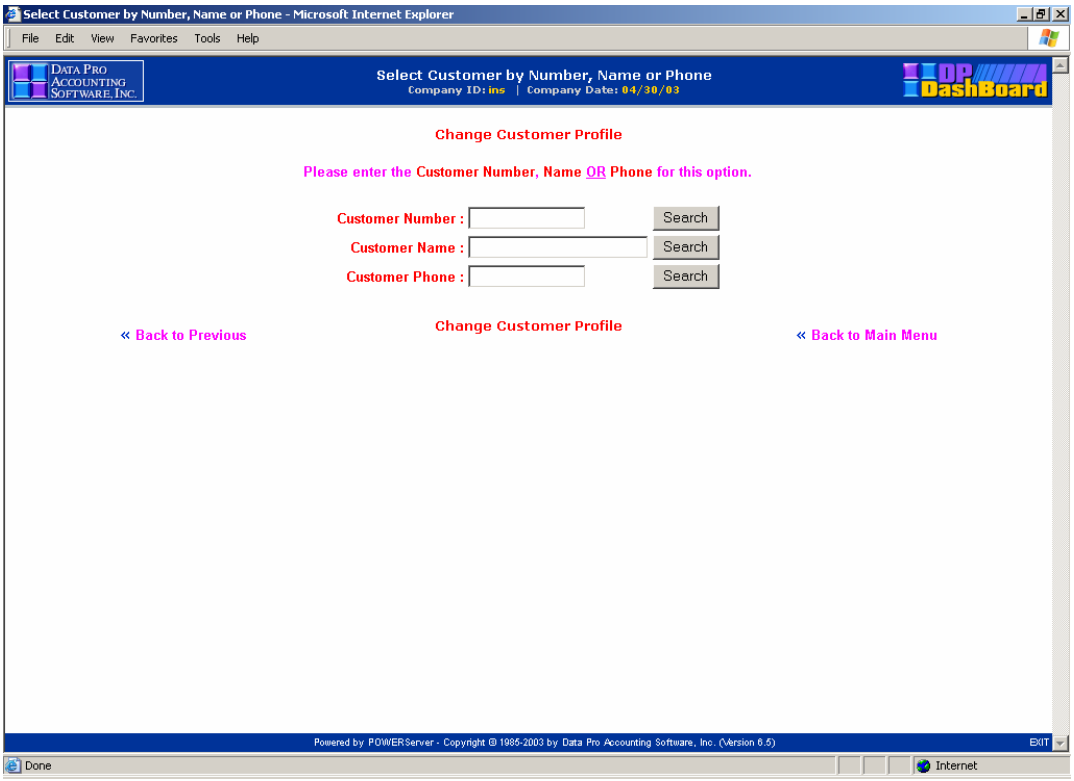


Figure 3-182. Select Customer by Number, Name or Phone Screen – Change Customer Profile Screen

2. Perform one of the following search options:
   a. Enter the assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Change Customer Profile screen displays (Figure 3-183).

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER A/R module.

OR

   b. Enter the full or partial name of the customer in the **Customer Name** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Change Customer Profile screen displays (Figure 3-183).

OR

   c. Enter the phone number of the customer in the **Customer Phone** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Change Customer Profile screen displays (Figure 3-183).

NOTE

The customer phone number must be entered exactly as it is defined in the Infinity POWER A/R module (i.e. use of dashes versus parenthesis).

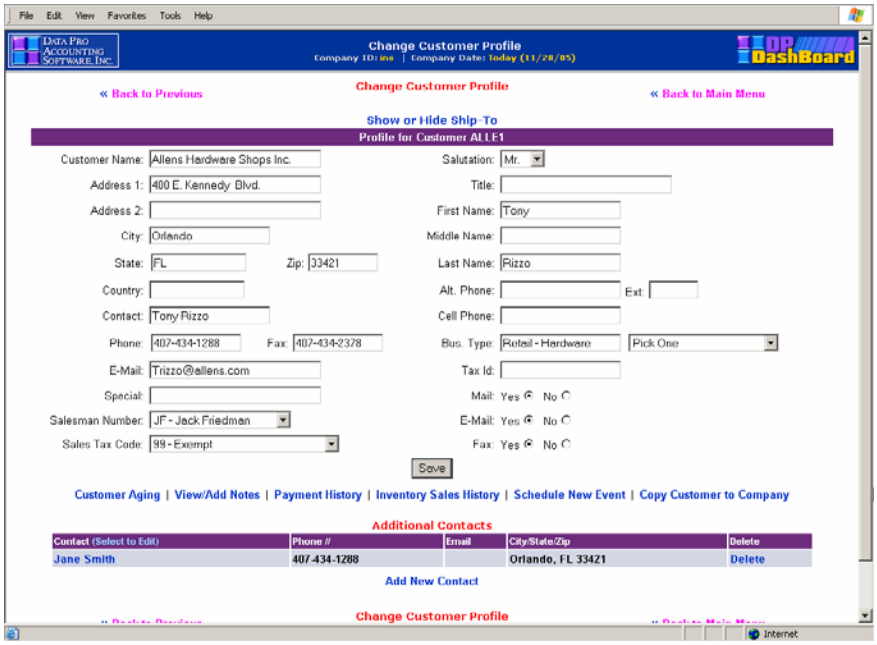


Figure 3-183. Change Customer Profile Screen (new screen)

The following table describes the **Change Customer Profile** screen details:

Show or Hide Ship-To	Toggles between displaying and hiding the customer's ship-to address. The Ship-To address can be modified by clicking on this option.
Customer Name:	Name of the customer. Clicking on this option opens a View/Add notes window for that customer. Adding notes may be done through this option.
Address 1	Primary mailing or physical address of the company (Bill To Address).
Address 2	Alternate mailing address of the company (Bill To Address).
City	City associated with the address provided in Address 1 text box.
State	State associated with the address provided in the Address 1 text box.
Zip Code	Zip code associated with the address provided in the Address 1 text box.
Country	Country associated with the address provided in the Address 1 text box.
Contact	Name of the main contact person associated with the customer account.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
E-mail	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.

Special	Displays contents of information stored in **"special"** user defined field stored in each customer's master record. The title of this field can vary depending on whether the user renamed this field in the A/R master configuration.
Salesman Number	Pull-down menu. Select the salesman associated with the customer. The Salesman Number is set up in the accounting system. Defaults to House.
Sales Tax Code	Pull-down menu. Select the sales tax code associated with the customer. The Sales Tax Code is set up in the accounting system. Defaults to 99 – Exempt.
Salutation	Pull-down menu. Select the appropriate salutation for main contact person of the customer account.
Title	Title of the main contact person of the customer account.
First Name	Full first name of the main contact person associated with the customer account.
Middle Name	Middle name of the main contact person associated with the customer account.
Last Name	Last name of the main contact person associated with the customer account.
Alt. Phone	Alternate phone number of main contact person.
Ext	Phone extension associated with the Alt. Phone number provided.
Cell Phone	Cell phone number of the main contact person of the customer account.
Bus. Type	Pull-down menu. Select from user defined business types.
Tax Id	Tax ID number for the customer.
Mail	Select either Yes or No to permit sending direct mail to the main contact person.
E-Mail	Select either Yes or No to permit sending e-mail to the main contact person of the customer account.
Fax	Select either Yes or No to permit sending faxes to the main contact person of the customer account.
View Customer Aging	Select this option to view aging and open items on the customer.
View/Add Notes Detail	Select this option to view or add notes to the customer profile.
View Customer Payment History	Select this option to view the customer's complete payment history.
Inventory Sales History	Select this option to view a customer's sales history. You can drilldown by invoice # to display a listing of the complete transaction detail.
Schedule New Event	Select this option to schedule an event for this customer in the Event Calendar.

Copy Customer to Company	Select this option to copy a customer to another company. Since **DP/DashBoard** supports multiple companies, this is an ideal function for telemarketing purposes whereby management may want to import or download lists of prospects from trade shows, mailing databases and other sources of leads whereby internal staff can utilize the various **DP/DashBoard** tools to call and schedule appointments and follow-up with leads. Once a lead is formalized in a separate **"lead"** company, this option is ideal for transferring the customer record and related information into the firms main Accounts Receivable Customer Database. Normally, firms will not want to import hundreds or thousands of prospect names into their main database until some kind of relationship is established with a new lead. This option makes this a truly seamless process!
Add New Contact	Select this option to add another customer contact.

3. Make any desired changes to the customer profile.
4. <Click> the **Show or Hide Ship-To** option to modify the customer's shipping address. The Ship-To window displays. Clicking the Save button in this window saves the changes and returns you to the **DP/DashBoard** Menu System screen.
5. <Click> the **Save** button to update the system with the new customer information. A message displays confirming the record has been updated and returns to the **DP/DashBoard** Menu System screen.

Add a New Customer Profile

This option allows you to add new customers into the **DP/DashBoard** system. Customers added here are automatically added to the Data Pro Infinity POWER A/R module.

The following screen illustrates where the **Reports & Drilldowns>Add a New Customer Profile** option is located on the **DP/DashBoard** Menu System screen (Figure 3-184).

Figure 3-184. Reports & Drilldowns>Add a New Customer Profile

To Add a New Customer Profile:

1. In the center of the **DP/DashBoard** Menu System screen (Figure 3-235), select the **Add a New Customer Profile** option from the Customer Support section. The Add a Customer screen displays (Figure 3-185).

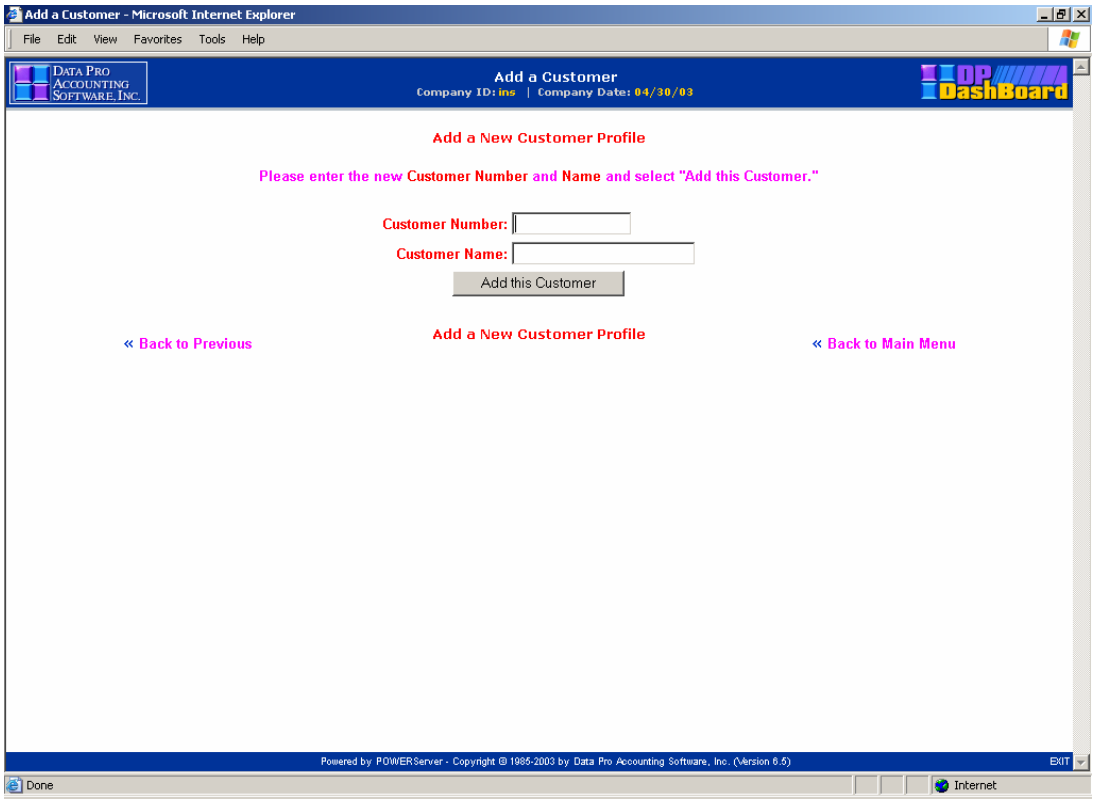


Figure 3-185. Add a Customer Screen

2. Enter a new customer number in the **Customer Number** text box that identifies the customer. The customer number may consist of a maximum of ten (10) alpha/numeric characters.
3. Enter the name of the customer in the **Customer Name** text box. The customer name may consist of up to thirty (30) alpha/numeric characters.
4. <Click> the **Add this Customer** button. The Change Customer Profile screen displays (Figure 3-186).

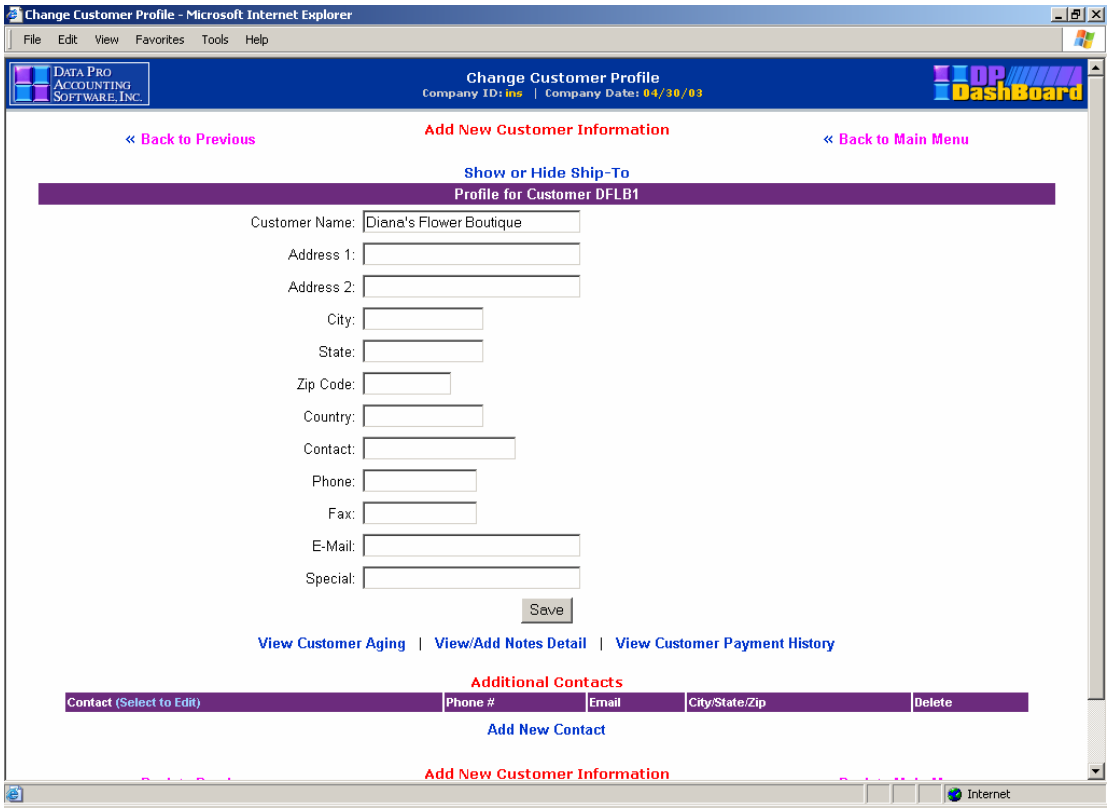


Figure 3-186. Change Customer Profile Screen – Add New Customer Information

5. Enter the **Contact Information** for the customer in the appropriate text boxes and pull-down menus.
6. Select the additional customer contact preferences from the **Mail, E-mail**, and **Fax** radio buttons. These fields can be used in sorting customer lists to include for mailings and such.
7. <Click> the **Save** button. A message displays confirming that the customer record has been updated, closes, and returns the **DP/DashBoard** Menu System screen.

To Add Additional Contacts:

1. From the Change Customer Profile screen (Figure 3-183), <click> the **Add New Contact** in the Additional Contacts section of the lower portion of the screen. The Add/Change Customer Contact screen (Figure 3-187) displays.

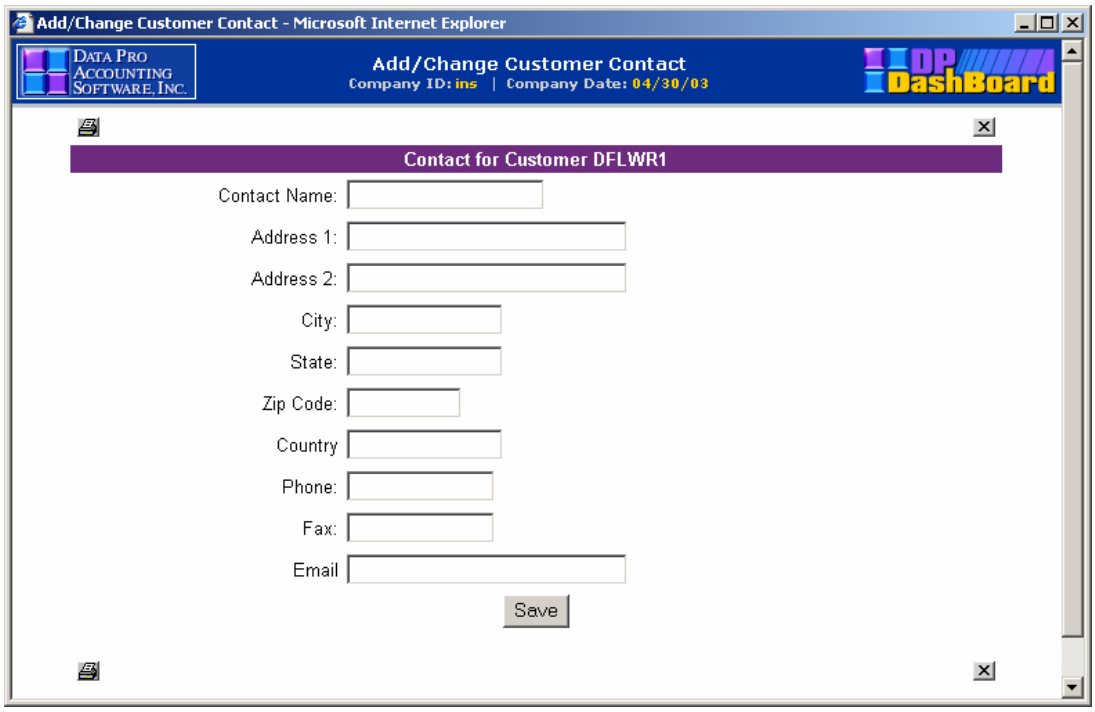


Figure 3-187. Add/Change Customer Contact Screen

2. Enter the **Contact Information** for the additional customer contact in the appropriate text boxes.
3. <Click> the **Save** button. The Add/Change Customer Contact screen closes and the new contact information displays in the Additional Contacts section of the Change Customer Profile screen.

SALES & PURCHASING

The Sales & Purchasing menu options from the DP/DashBoard Menu System screen, allow you to add new sales orders via a web-based data entry system, view existing sales orders, view existing purchase orders, and perform inventory item inquiries. This assumes, however, that you have purchased and installed the Infinity POWER Sales Order Entry (SO) module (P/N 106), Purchase Order Entry (PO) module (P/N 103), and Manufacturing Inventory Management (IM) module (P/N 105). Otherwise, most of these features will not be available.

These features are accessible in the **Sales & Purchasing** section of the DP/DashBoard Menu System screen (Figure 3-188).

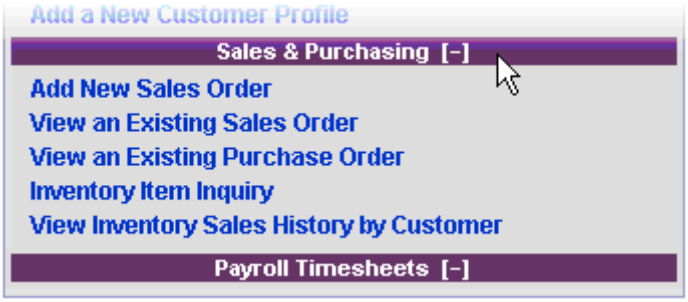


Figure 3-188. Sales & Purchasing Section

Add New Sales Order

When a customer calls in with a purchase request, a Sales Representative can add a sales order right from the web. This creates a record of that customer request, which can be accessed at any time for reference. While entering the Sales Order, the sales representative has access to the customer's payment history, as well as previously taken notes on the customer's account. Additionally, users can perform an inquiry on any previously entered order in the system for that customer using the View an Existing Sales Order option.

The following screen illustrates where the **Sales & Purchasing>Add New Sales Order** option is located on the DP/DashBoard Menu System screen (Figure 3-189).

Figure 3-189. Sales & Purchasing>Add New Sales Order

To Add a New Sales Order:

1. In the center of the DP/DashBoard Menu System screen, select the **Add New Sales Order** option from the Sales & Purchasing section. The Add New Sales Order> Select Customer by Number, Name or Phone screen (Figure 3-190) displays.

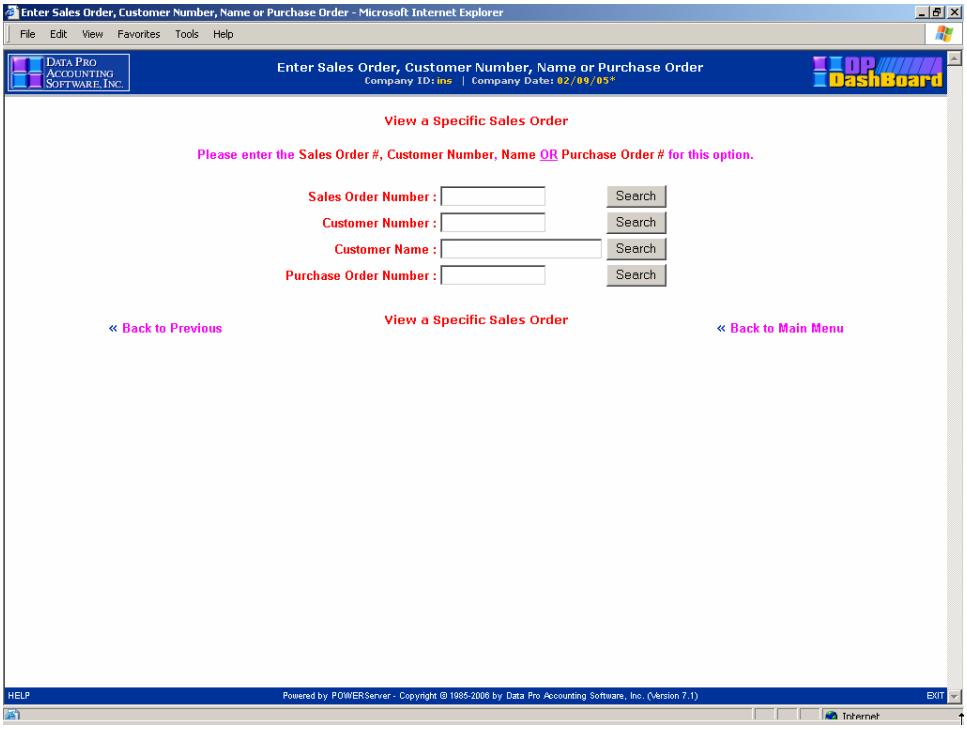


Figure 3-190. Add New Sales Order>Select Customer by Number, Name or Phone>Add New Sales Order Screen

2. Perform one of the following search options:

a. Enter the assigned customer number in the **Customer Number** text box and <click> the **Search** button.

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER program.

OR

b. Enter the full or partial name of the customer in the **Customer Name** text box and <click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

OR

c. Enter the phone number of the customer in the **Customer Phone** text box and <click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list.

NOTE

The customer phone number must be entered exactly as it is defined in the Infinity POWER program.

The Add New Sales Order screen (Figure 3-191) displays providing all the known customer information in the appropriate fields.

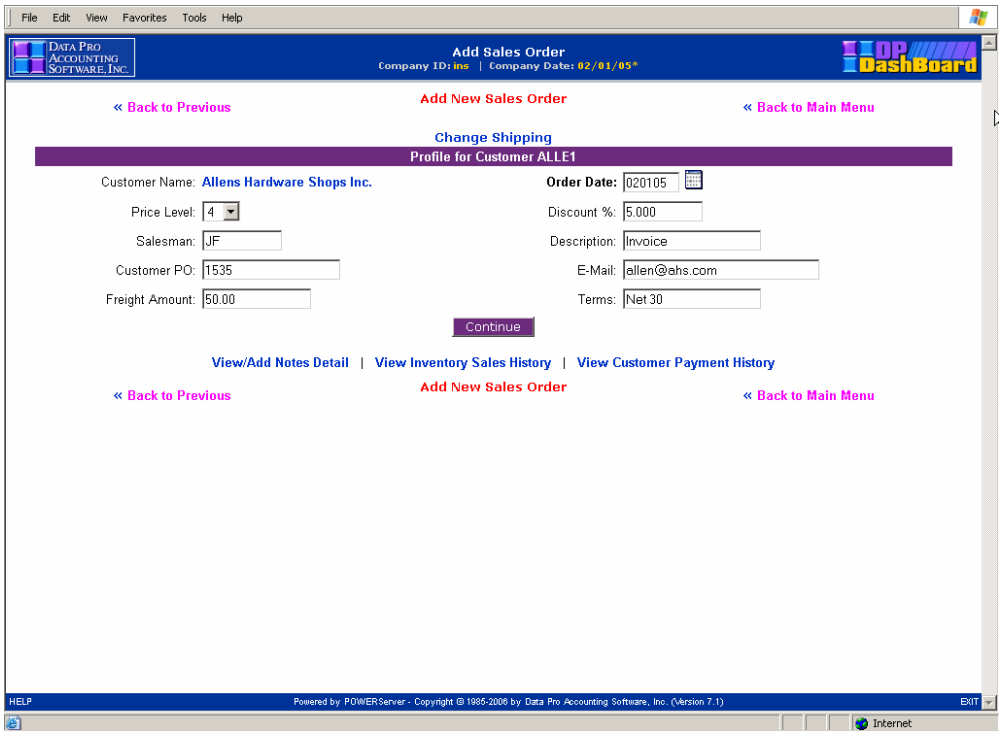


Figure 3-191. Add New Sales Order Screen

The following table describes the **Add New Sales Order** screen details:

Change Shipping	Click this option to change the customer shipping address for this particular sales order. Make any desired changes to the customers shipping address and click the Save & Continue button.
Customer Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Price Level	Price level you want to assign to that customer. Valid selections are 1-10.
Salesman	Name of the salesman executing the sales order request.
Customer PO	Enter the purchase order number associated with this sales order.
Freight Amount	Enter the freight amount, if applicable.
Order Date	Date the sales order is entered into the system.
Discount %	Percentage of discount applied to that particular sales order.
Description	Description of the sales order.
E-mail	E-mail address of the customer.
Terms	Payment terms for this order. Defaults to standard terms defined in customer's file.

View/Add Notes Detail	Clicking this option opens the View All Notes For This Customer screen. Any previous notes on the customer display. From this screen, you can add a new note to the customer profile.
View Inventory Sales History	Clicking this option opens the Customer Inventory Sales History screen. This option allows you to view a customer's sales history. You can drilldown by invoice # to display a listing of the complete transaction detail. From the selected customer's sales history, previously ordered items an be selected and a new sales order can be created.
View Customer Payment History	Clicking this option opens the Customer Payment History screen displaying a full payment history with transaction details. From this screen you can also view the aging on the customer, add notes, send e-mail to the customer, and schedule a new event.

3. Enter the desired information in the appropriate fields.
4. <Click> the **Continue** button. The Sales Order detail screen displays (Figure 3-192) reflecting the data entered on the previous screen.

NOTE

A warning will display if the customer has a past due balance or if they are over their credit limit.

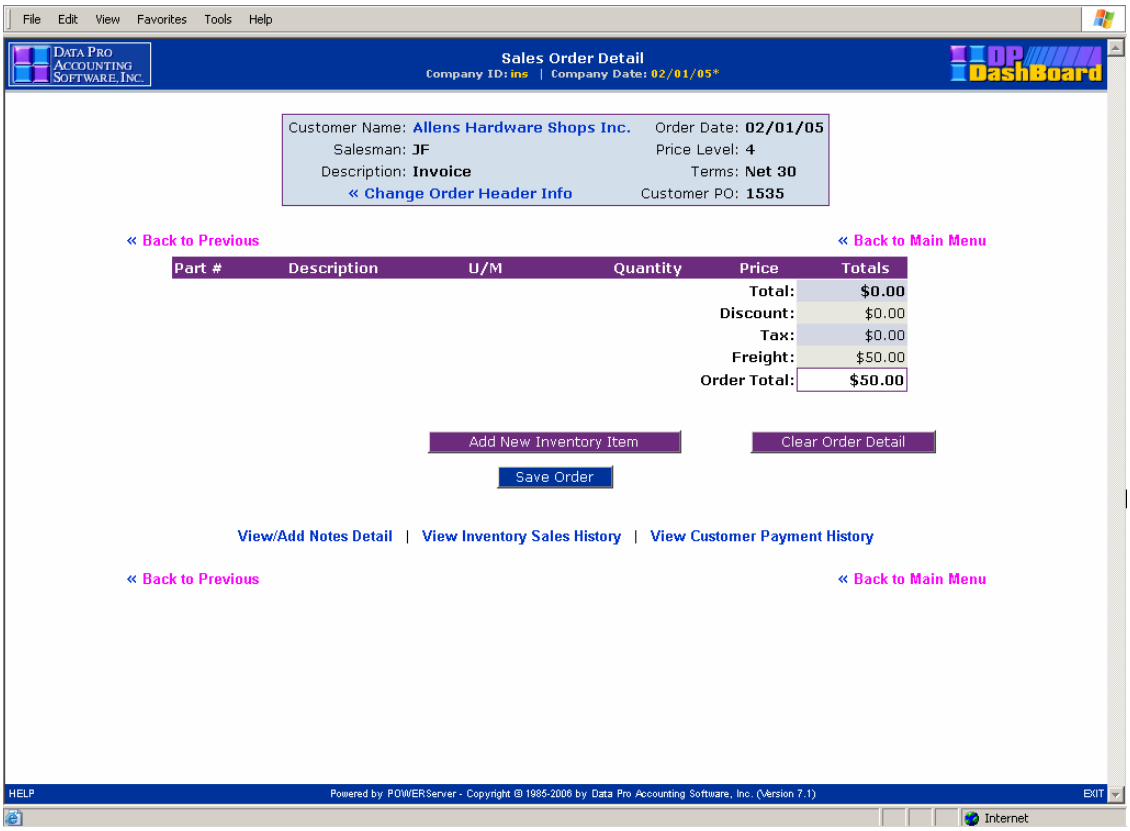


Figure 3-192. Sales Order Detail Screen

The following table describes the **Sales Order Detail** screen details:

UPPER SECTION	
Customer Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Salesman	Name of the salesman executing the sales order request.
Description	Description of the sales order.
Order Date	Date the sales order is entered into the system.
Price Level	Price level you want to assign to that customer. Valid selections are 1-10.
Terms	Payment terms for this order. Defaults to standard terms defined in customer's file.
Customer PO	Associated purchase order number for the customer.
<< Change Order Header Info	Clicking this option opens the Add Sales Order Screen. Make the desired edits to any of the fields such as date, description, etc.
LOWER SECTION	
Part Number	Part number of the inventory item(s) being purchased.
Description	Description of the inventory item.
U/M	Unit of measure related to the inventory item such as each, gal, ft, inches, etc.
Quantity	Number of items purchased for that particular inventory item.
Price	Price of the inventory item.
Totals	Total amount due for all items being purchased including applied discounts and freight charges.
Add New Inventory Item	Clicking this option opens the Select Inventory Item option and allows you to add additional inventory items to the current sales order.
Clear Order Detail	Clicking this option clears the Sales Order Detail values without saving the sales order.
Save Detail	Clicking this option saves the current Sales Order.

4. <Click> the **Add New Inventory Item** button to add inventory items to the sales order. The Select Inventory Item screen displays (Figure 3-193).

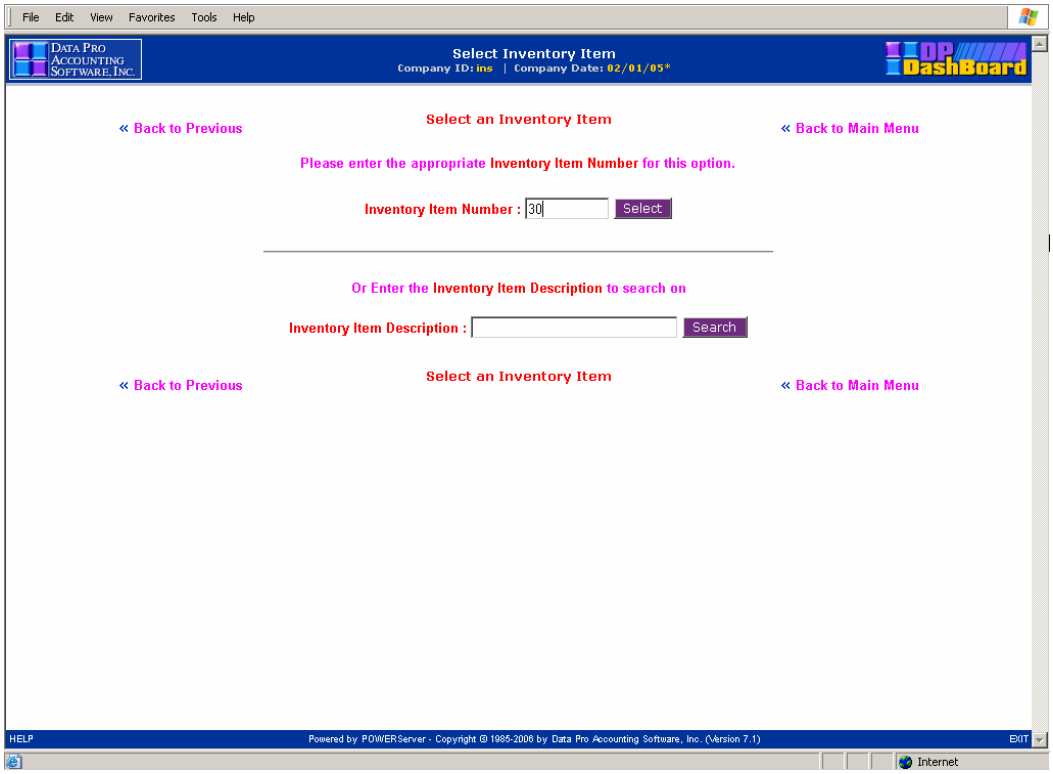


Figure 3-193. Select Inventory Item Screen

5. Enter the first few numbers or the entire inventory number in the **Inventory Item Number** text box, then <click> the Select button.

OR

6. Enter a keyword in the Inventory **Item Description** text box, then <click> the **Search** button. The Select an Inventory Item screen displays listing all the available items that are a match with the keyword.

   The Search Inventory Items screen displays listing the available inventory items including details such as part number, description, bin number, and category. (Figure 3-194).

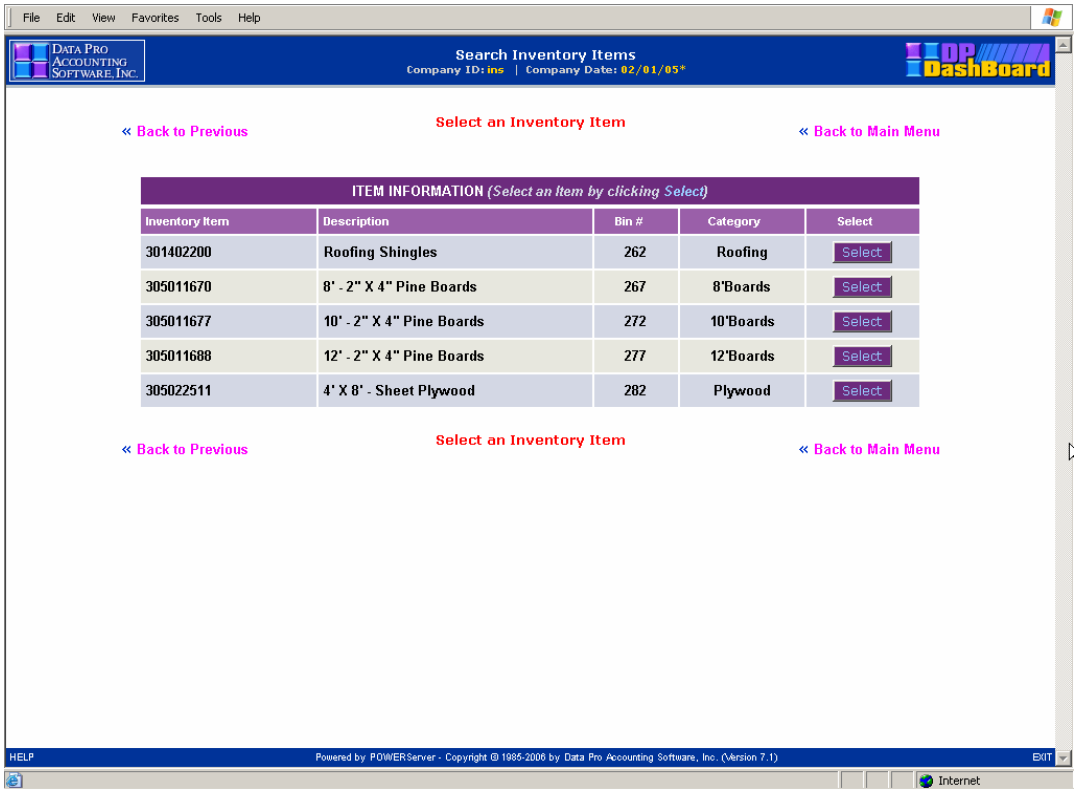


Figure 3-194. Search Inventory Items Screen

7. Choose the desired inventory item from the list and <click> the **Select** button. The Get Inventory Item screen (Figure 3-195) displays details of the selected inventory item such as item number, description, U/M, quantity and price.

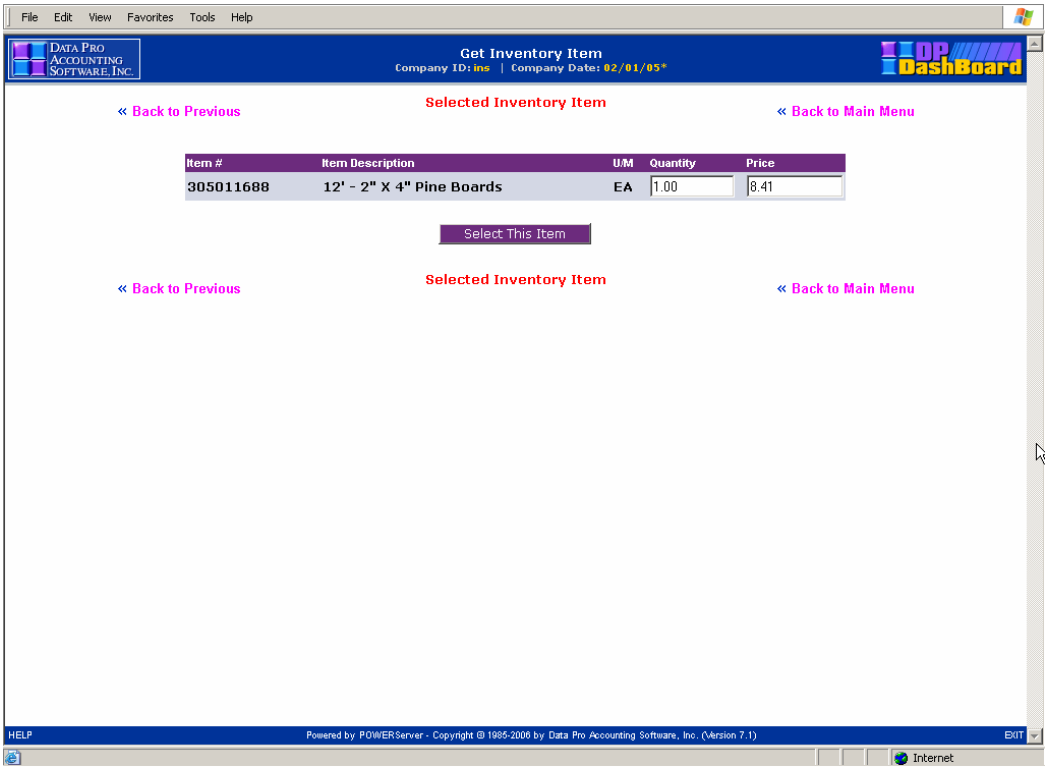


Figure 3-195. Get Inventory Item Screen

8. Enter the desired Quantity and Price for the item, then <click> the **Select This Item** button. The Sales Order Detail screen is updated to include the selected inventory items (Figure 3-196) and calculates the order total. Continue to add as many inventory items as desired.

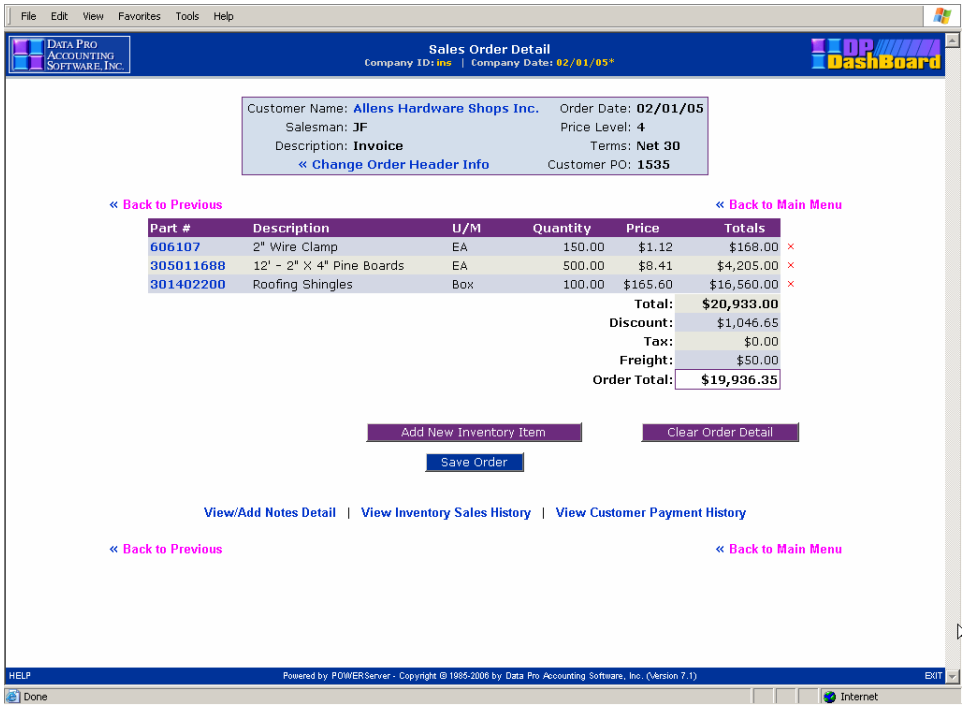


Figure 3-196. Sales Order Detail – Inventory Items Selected

NOTE

To edit an item on the order, <click> the **Part #** to make edits to that item. To remove an item from the order, <click> the red **X** next to the Total column of the item to be removed.

9. <Click> the **Save Order** button to save all selections to this sales order. The Save Sales Order screen (Figure 3-197) displays. Notice that they system automatically generates a sales order number for the sales order.

NOTE

If a deposit is required for a particular order, you will be prompted to provide the appropriate payment information such as Payment Type, Credit Card #, Expiration Date, and Cardholder's Name. You will then be prompted to post the deposit.

Figure 3-197. Save Sales Order Screen

The following table describes the **Save Sales Order** screen details:

Customer Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Salesman	Name of the salesman executing the sales order request.
Description	Description of the sales order.
Order Date	Date the sales order is entered into the system.
Price Level	Price level you want to assign to that customer. Valid selections are 1-10.
Terms	Payment terms for this order. Defaults to standard terms defined in customer's file.
Customer PO	Associated purchase order number for the customer.
View Sales Order	Clicking this button opens the View Sales Order Detail window. Details such as the customer profile, shipping address, and sales order information is included.

From this screen you can view the sales order detail (Figure 3-198), add a new order from this sales order, or return to the Main Menu.

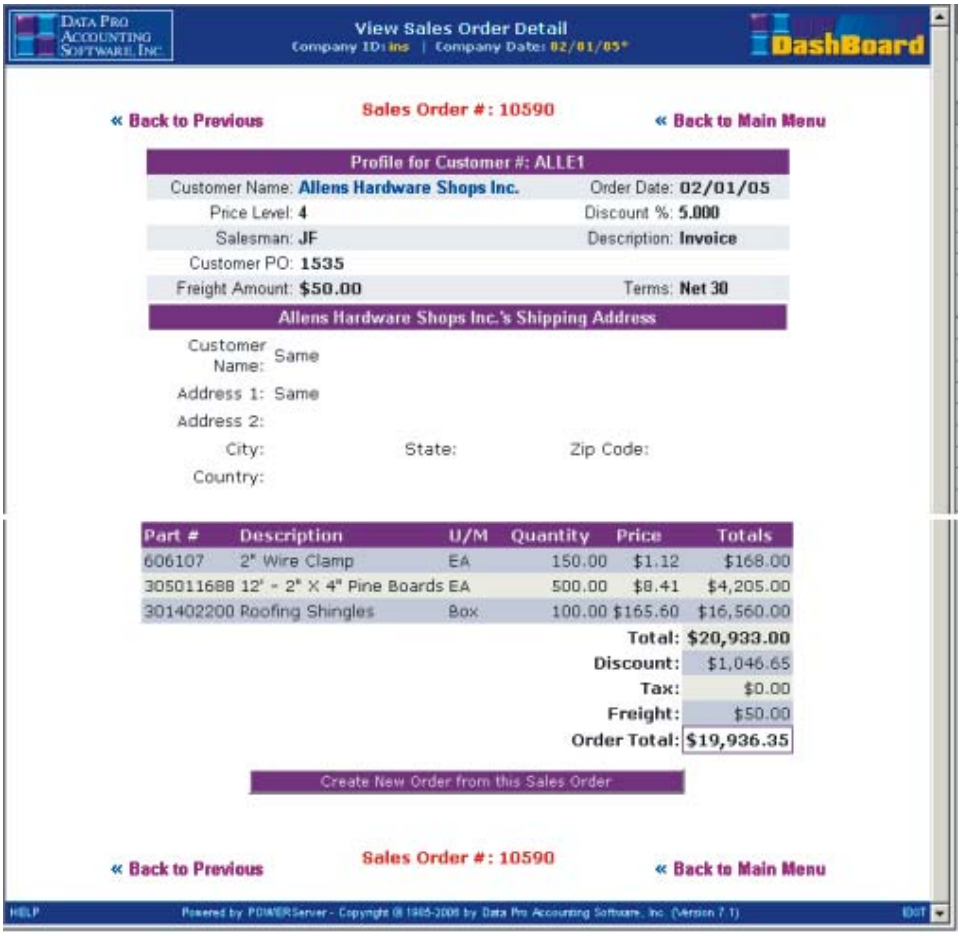


Figure 3-198. View Sales Order Detail Window

View an Existing Sales Order

This option allows you to view existing sales orders. You can search sales orders by sales order number, customer number, customer name, or purchase order number.

The following screen illustrates where the **Sales and Purchasing>View an Existing Sales Order** option is located on the DP/DashBoard Menu System screen (Figure 3-199).

Figure 3-199. Sales & Purchasing>View and Existing Sales Order

To View an Existing Sales Order:

1. In the center of the DP/DashBoard Menu System screen, select the **View an Existing Sale Order** option from the Sales & Purchasing section. The View a Specific Sales Order > Enter Sales Order, Customer Number, Name or Purchase Order screen (Figure 3-200) displays.

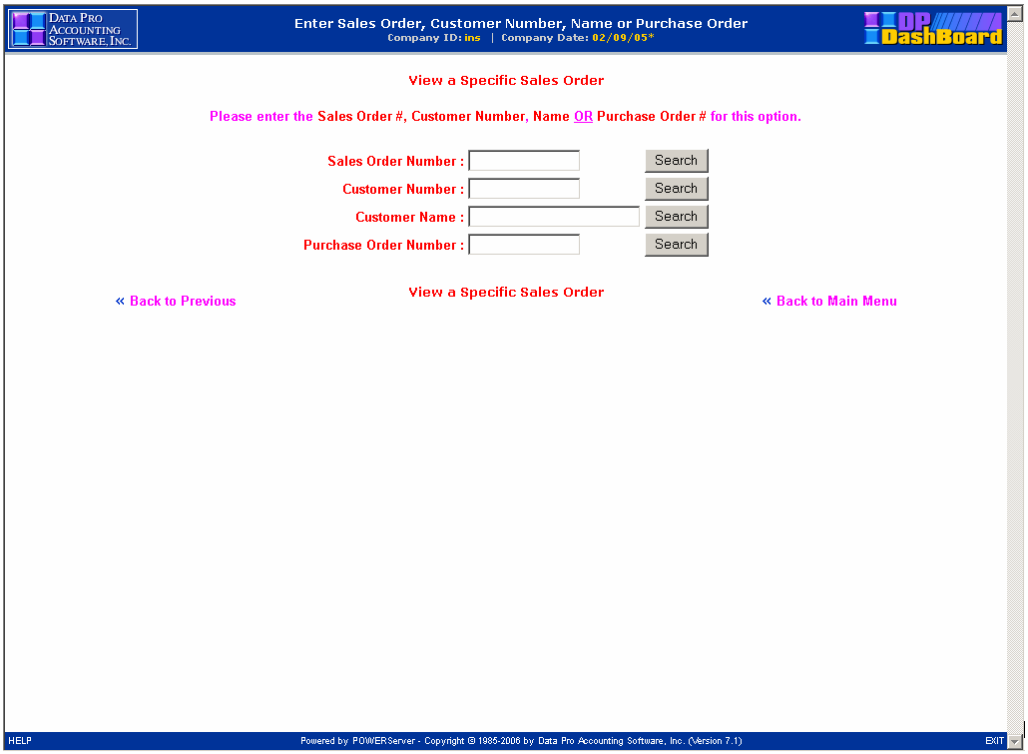


Figure 3-200. Enter Sales Order, Customer Number, Name or Purchase Order> View a Specific Sales Order Screen

2. Enter either the full or partial Sales Order, Customer Number, Customer Name, or Purchase order then <click> the **Search** button. The Search Customer screen (Figure 3-201) displays listing the search results including the following details: order date, customer name, purchase order #, and sales order #.

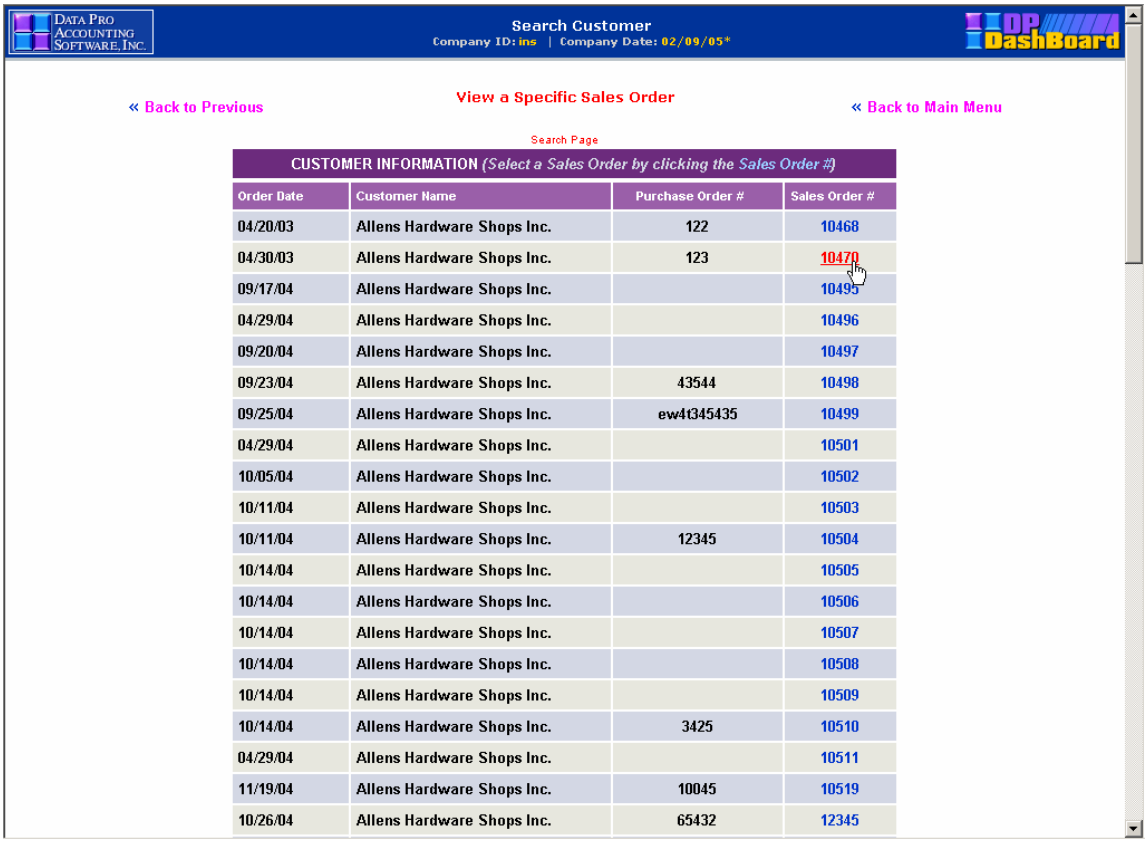


Figure 3-201. Search Customer Screen

3. Select the desired sales order to view by clicking on the **Sales Order #**. The View Sales Order Detail screen (Figure 3-202) displays with all the details of the selected sales order including customer profile, shipping address, and details on selected inventory items.

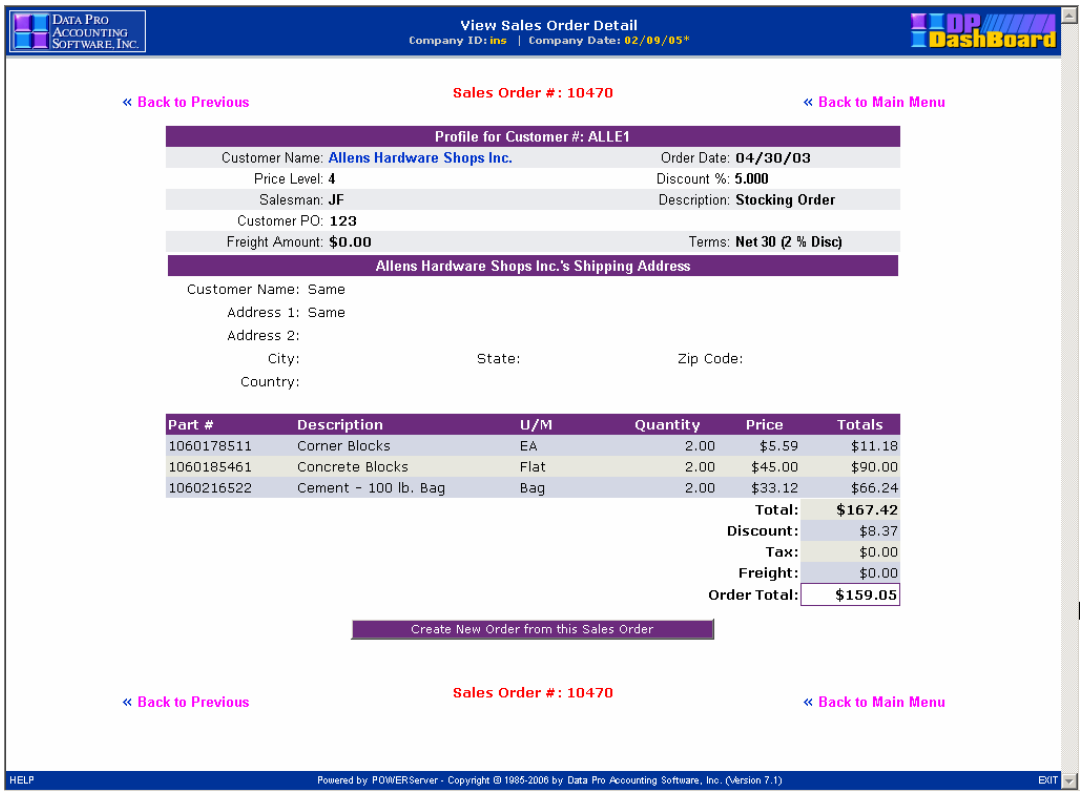


Figure 3-202. View Sales Order Detail Screen

From here, you can view the sales order details, create a new order from this sales order, or return to the main menu.

View an Existing Purchase Order

This option allows you to view existing purchase orders. You can search sales orders by sales order number, customer number, customer name, or purchase order number.

The following screen illustrates where the **Sales and Purchasing> View an Existing Sales Order** option is located on the DP/DashBoard Menu System screen (Figure 3-203).

Figure 3-203. Sales & Purchasing>View and Existing Purchase Order

To View an Existing Purchase Order:

1. In the center of the DP/DashBoard Menu System screen select the **View an Existing Purchase Order** option from the Sales & Purchasing section. The View a Specific Purchase Order > Enter Purchase Order, Vendor Number, Name or Vendor Sales Order screen (Figure 3-204) displays.

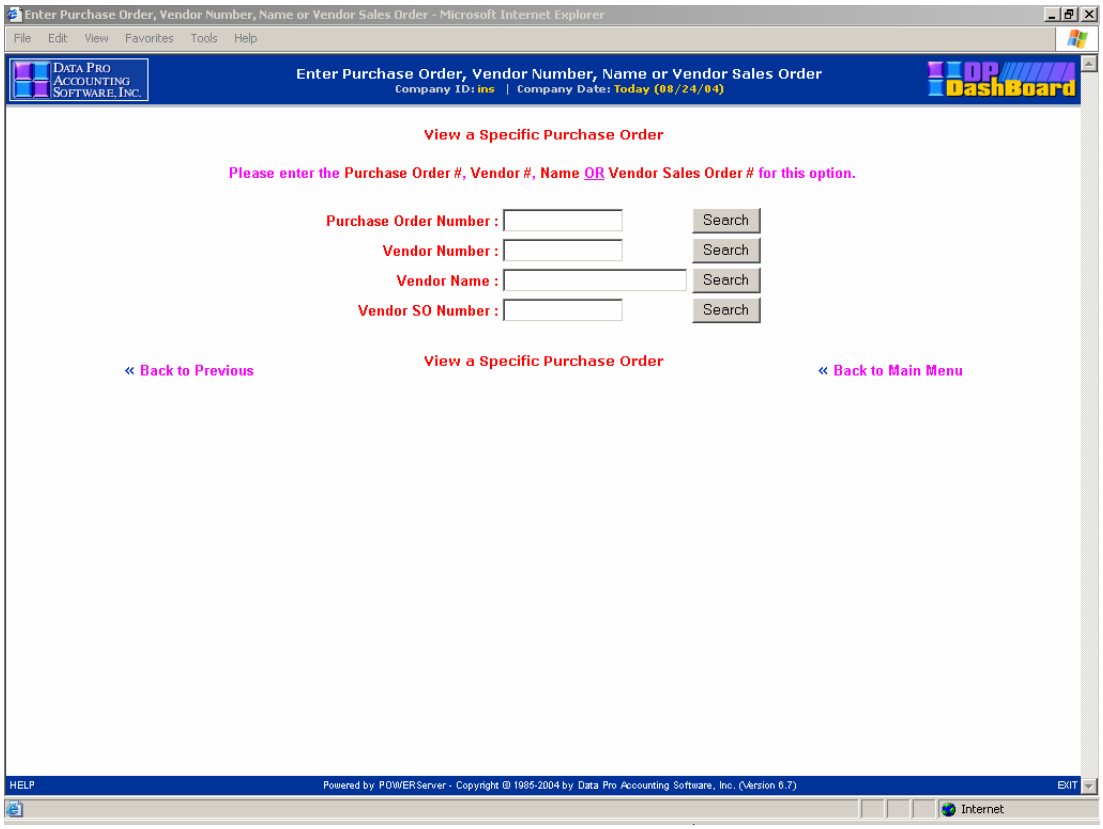


Figure 3-204. Enter Purchase Order, Vendor Number, Name or Vendor SalesOrder> View a Specific Purchase Order Screen

2. Enter the desired Purchase Order, Vendor Number, Name, or Vendor Sales Order, then <click> the **Search** button. The Search Vendor screen (Figure 3-205) displays listing the search results including the following details: order date, customer name, purchase order #, and sales order #.

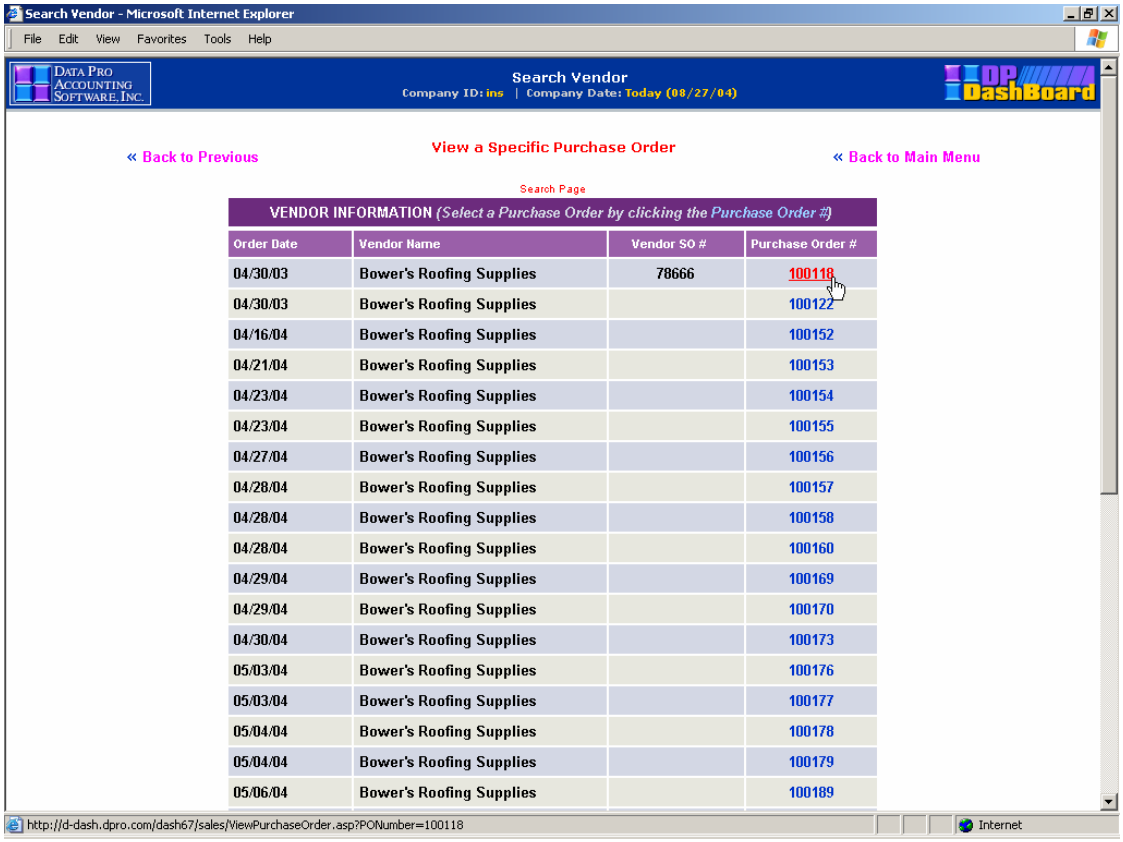


Figure 3-205. Search Vendor Screen

3. Select the desired purchase order to view by clicking on the **Purchase Order #**. The View Purchase Order Detail screen (Figure 3-206) displays with all the details of the selected purchase order including customer profile, shipping address, and details on selected inventory items.

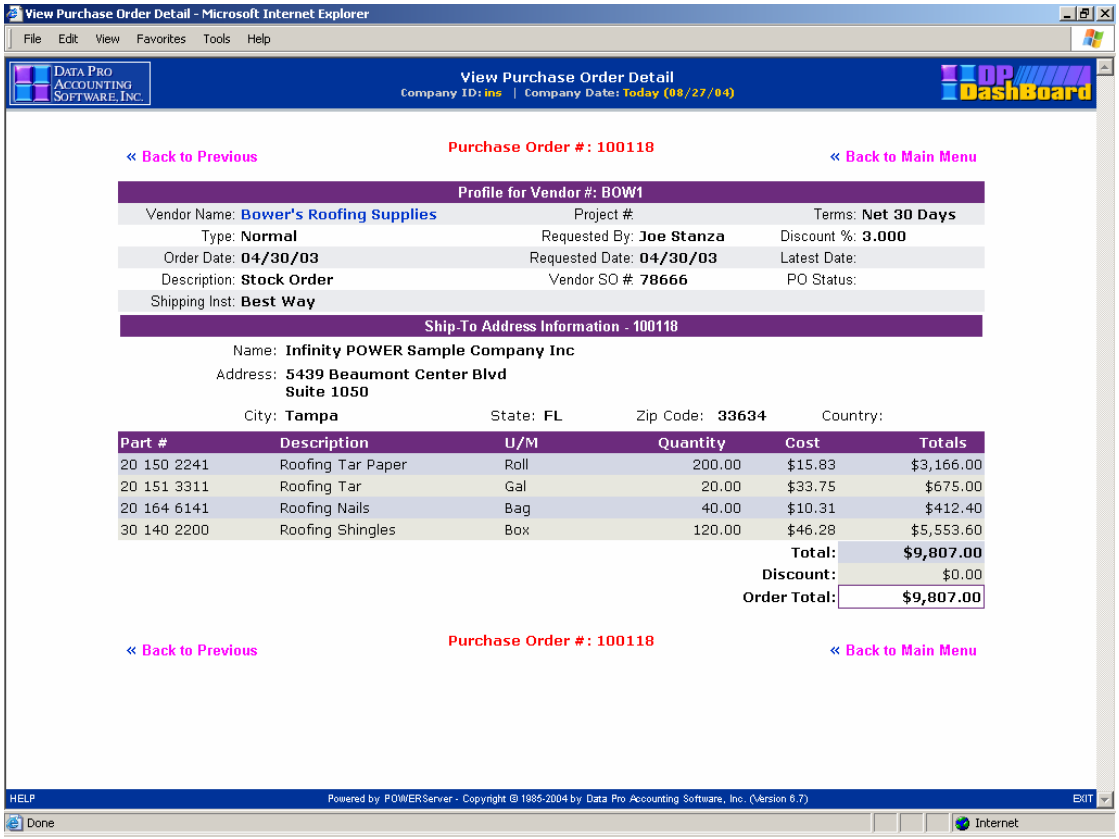


Figure 3-206. View Purchase Order Detail Screen

Inventory Item Inquiry

This option allows you to search for a specific inventory item. You can search inventory items by inventory item number or by a keyword description.

The following screen illustrates where the **Sales and Purchasing> Inventory Item Inquiry** option is located on the DP/DashBoard Menu System screen (Figure 3-207).

Figure 3-207. Sales & Purchasing>Inventory Item Inquiry

To Perform an Inventory Item Inquiry:

1. In the center of the DP/DashBoard Menu System screen, select the **Inventory Item Inquiry** option from the Sales & Purchasing section. The Select Inventory Item screen (Figure 3-208) displays.

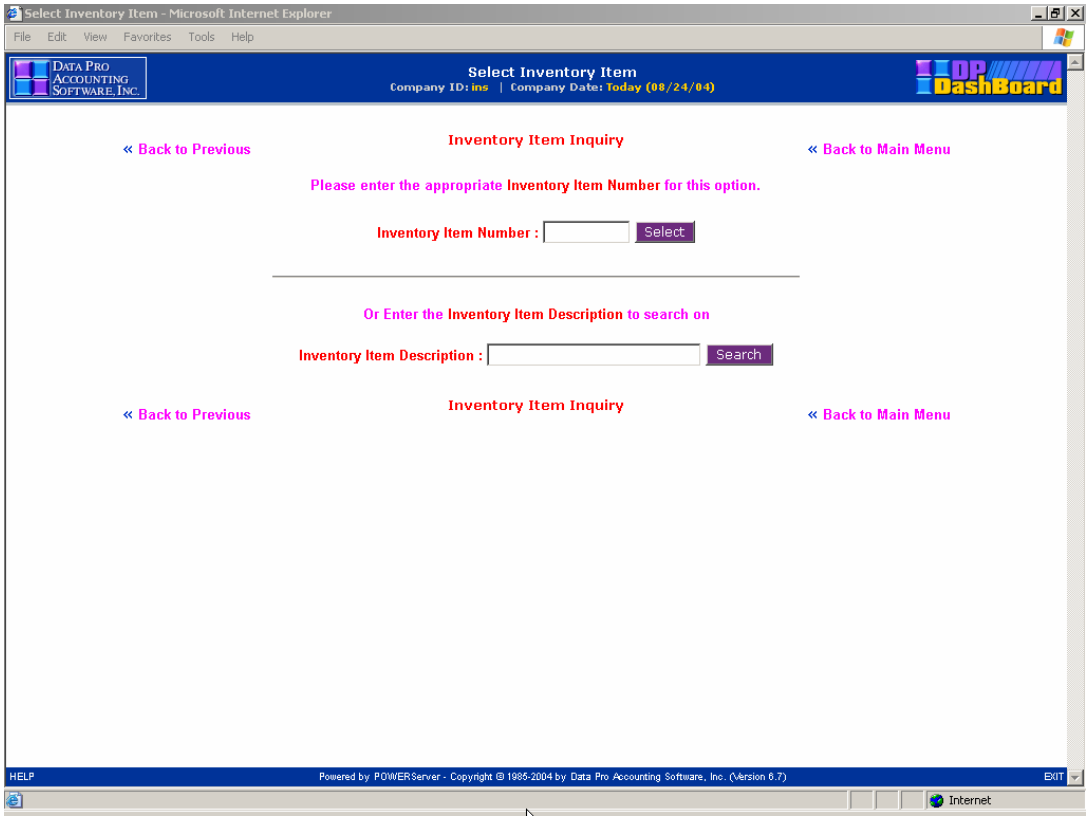


Figure 3-208. Select Inventory Item Screen

2. Enter the first few numbers or the entire inventory number in the **Inventory Item Number** text box, then <click> the **Select** button.

OR

3. Enter a keyword in the Inventory **Item Description** text box, then <click> the **Search** button. The Select an Inventory Item screen displays listing all the available items that are a match with the keyword.

   The Search Inventory Items screen displays listing the available inventory items including details such as part number, description, bin number, and category. (Figure 3-209).

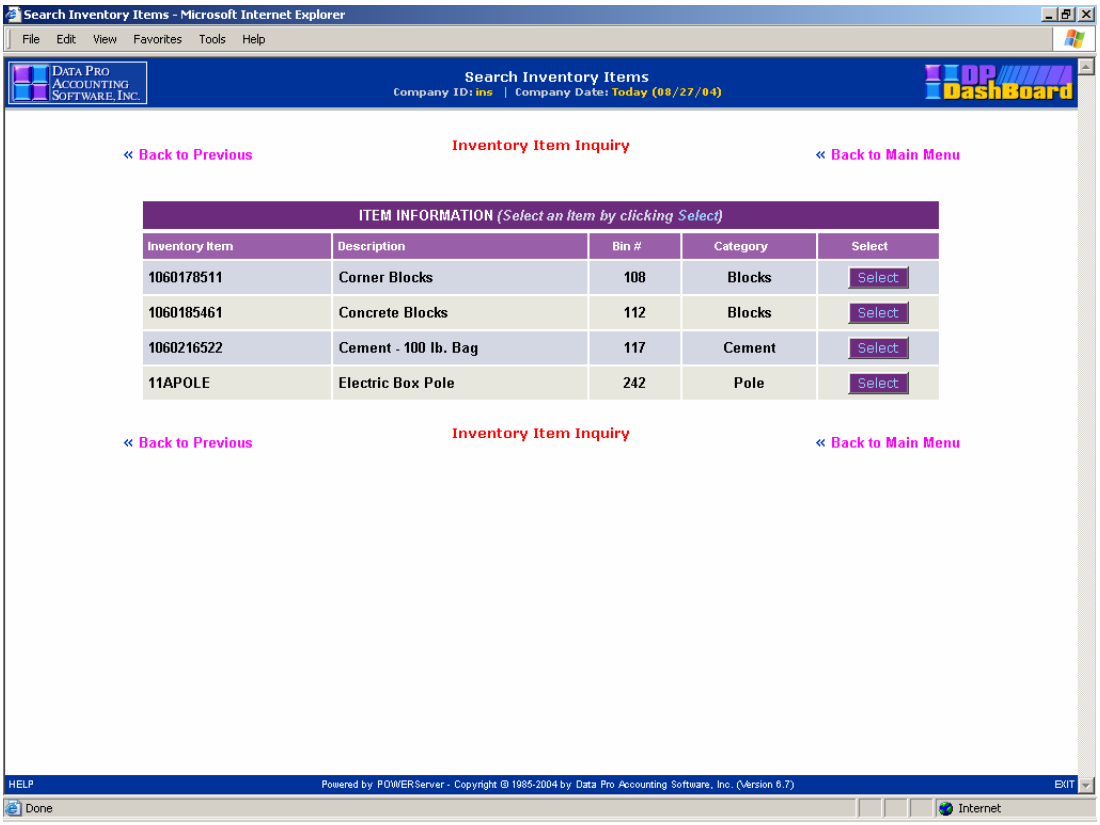


Figure 3-209. Search Inventory Items Screen>Inventory Item Inquiry Screen

4. Choose the desired inventory item from the list and <click> the **Select** button. The Inventory Item Inquiry screen (Figure 3-210) displays details of the selected inventory item such as item number, description, U/M, quantity information, and Cost/Cost Level information.

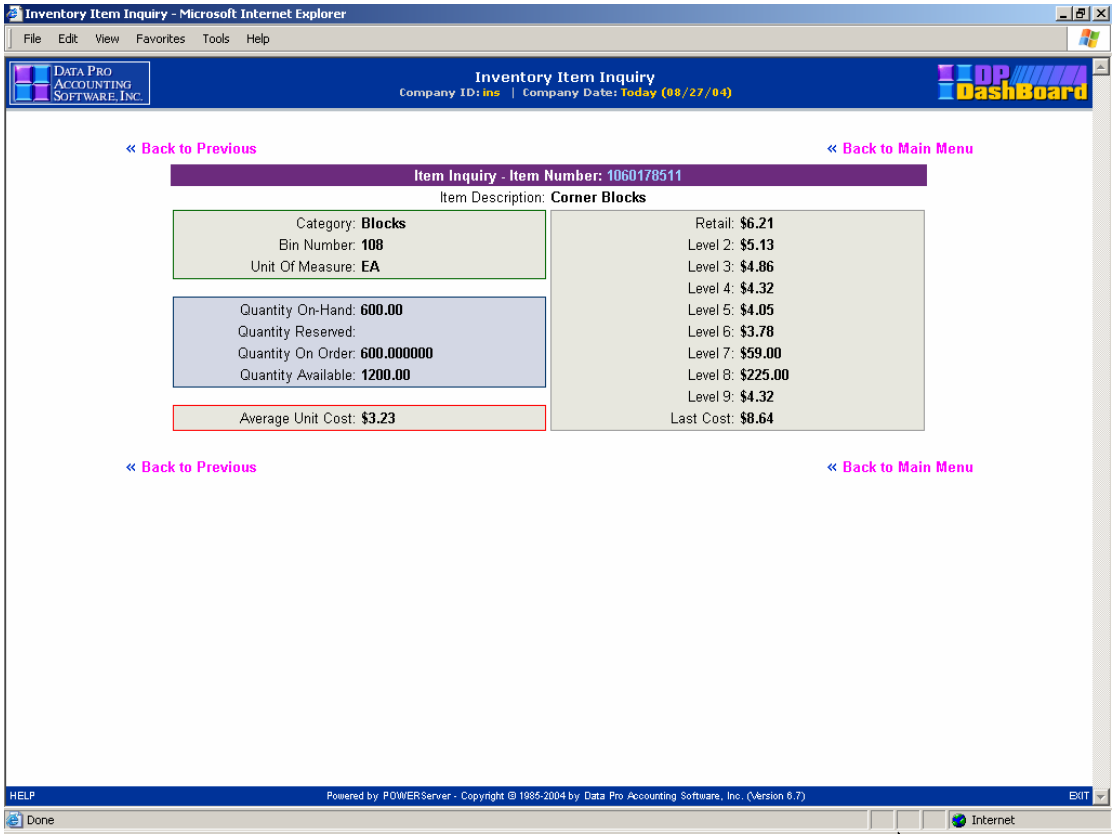


Figure 3-210. Inventory Item Inquiry Screen

View Inventory Sales History by Customer

This option allows you to view a customer's sales history. You can drilldown by invoice # to display a listing of the complete transaction detail. From the selected customer's sales history, previously ordered items an be selected and a new sales order can be created.

The following screen illustrates where the **Sales and Purchasing>View Historical Sales History by Customer** option is located on the DP/DashBoard Menu System screen (Figure 3-211).

Figure 3-211. Sales & Purchasing> View Historical Sales History by Customer

To View a Customer's Historical Sales History:

1. In the center of the DP/DashBoard Menu System screen, select the **View Historical Sales History by Customer** option from the Sales & Purchasing section. The Select Customer by Number, Name or Phone screen displays screen (Figure 3-212) displays.

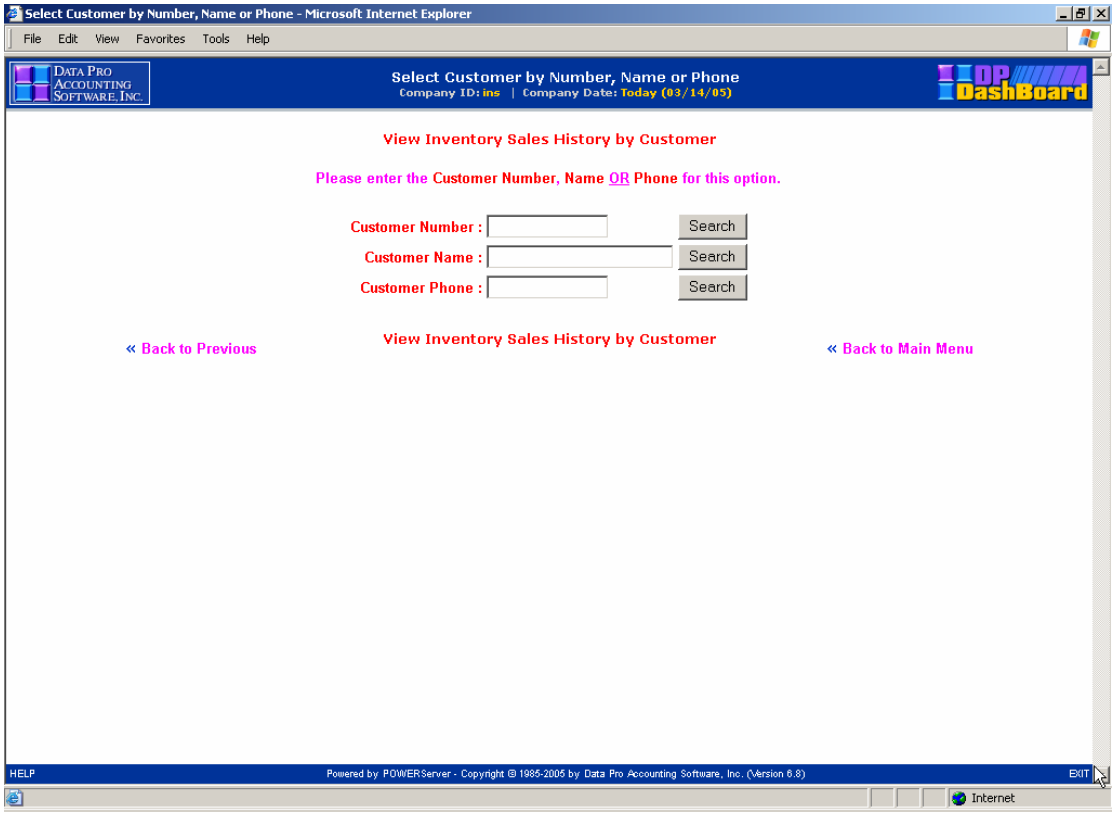


Figure 3-212. Select Customer by Number, Name or Phone Screen – View Inventory Sales History by Customer

2. Perform one of the following search options:

a. Enter the full or partial assigned customer number in the **Customer Number** text box. <Click> the **Search** button. The Search Customer – View Inventory Sales History by Customer screen displays (Figure 3-213).

NOTE

The customer number must be entered exactly as it is defined in the Infinity POWER A/R module.

OR

b. Enter the full or partial name of the customer in the **Customer Name** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Search Customer – View Inventory Sales History by Customer screen displays (Figure 3-213).

OR

c. Enter the phone number of the customer in the **Customer Phone** text box. <Click> the **Search** button. The Search Customer screen displays. <Click> the desired customer from the **Name** column of the Customer Information list. The Search Customer – View Inventory Sales History by Customer screen displays (Figure 3-213.

NOTE

The customer phone number must be entered exactly as it is defined in the Infinity POWER A/R module (i.e. use of dashes versus parenthesis).

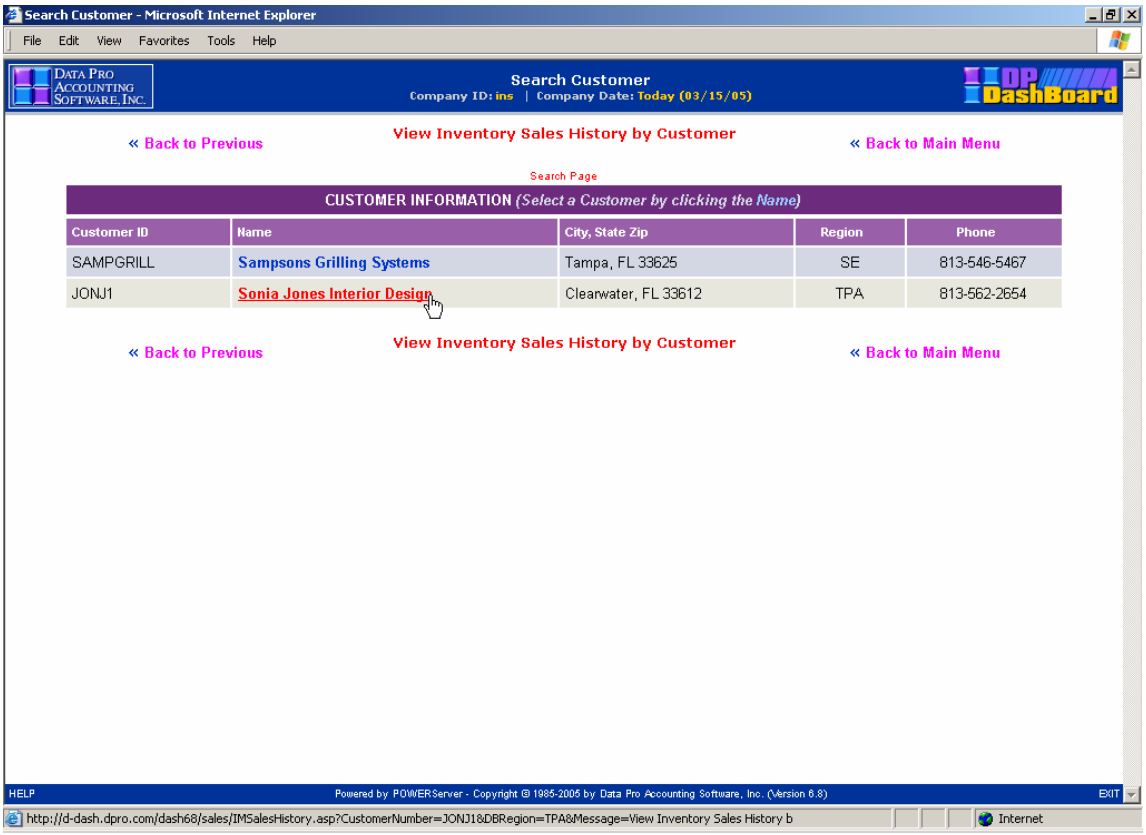
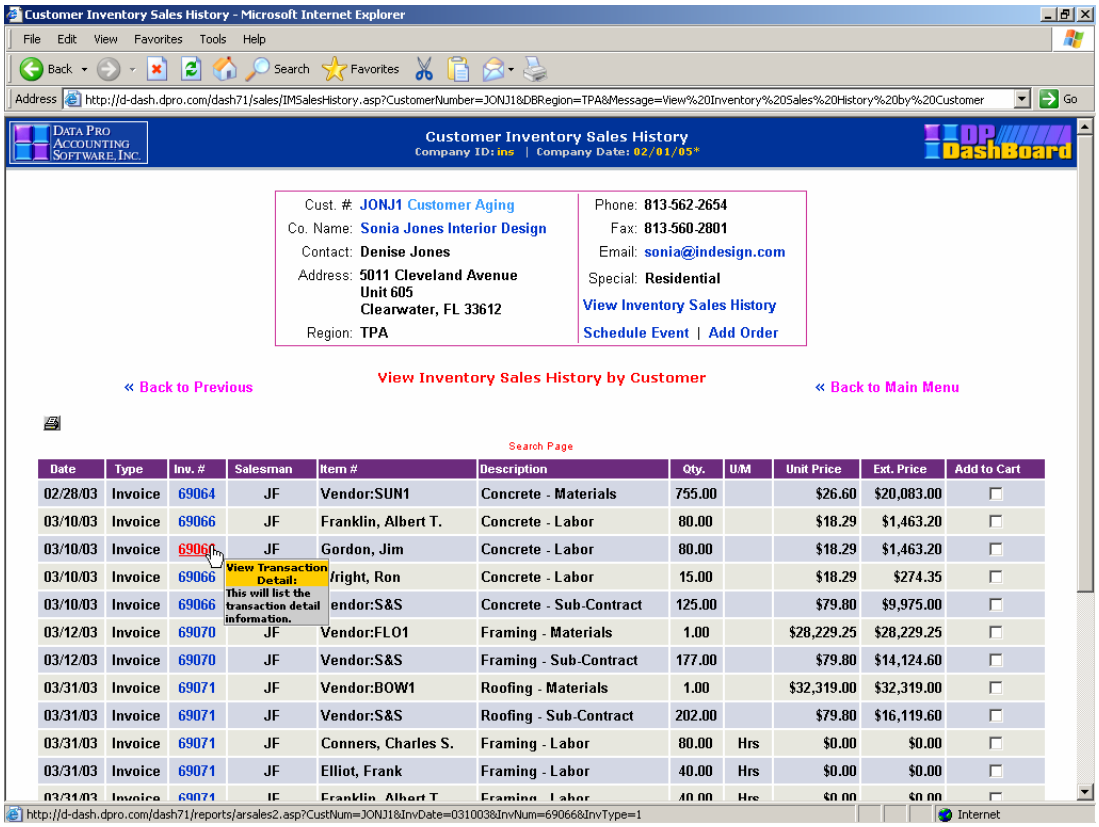


Figure 3-213. Search Customer> View Inventory Sales History by Customer Screen

3. Select the desired customer from the **Name** column (Figure 3-213). The Customer Inventory Sales History screen (Figure 3-214) displays details of all the invoices related to that customer.



Date	Type	Inv. #	Salesman	Item #	Description	Qty.	U/M	Unit Price	Ext. Price	Add to Cart
02/28/03	Invoice	69064	JF	Vendor:SUN1	Concrete - Materials	755.00		$26.60	$20,083.00	
03/10/03	Invoice	69066	JF	Franklin, Albert T.	Concrete - Labor	80.00		$18.29	$1,463.20	
03/10/03	Invoice	69066	JF	Gordon, Jim	Concrete - Labor	80.00		$18.29	$1,463.20	
03/10/03	Invoice	69066	JF	/right, Ron	Concrete - Labor	15.00		$18.29	$274.35	
03/10/03	Invoice	69066	JF	endor:S&S	Concrete - Sub-Contract	125.00		$79.80	$9,975.00	
03/12/03	Invoice	69070	JF	Vendor:FLO1	Framing - Materials	1.00		$28,229.25	$28,229.25	
03/12/03	Invoice	69070	JF	Vendor:S&S	Framing - Sub-Contract	177.00		$79.80	$14,124.60	
03/31/03	Invoice	69071	JF	Vendor:BOW1	Roofing - Materials	1.00		$32,319.00	$32,319.00	
03/31/03	Invoice	69071	JF	Vendor:S&S	Roofing - Sub-Contract	202.00		$79.80	$16,119.60	
03/31/03	Invoice	69071	JF	Conners, Charles S.	Framing - Labor	80.00	Hrs	$0.00	$0.00	
03/31/03	Invoice	69071	JF	Elliot, Frank	Framing - Labor	40.00	Hrs	$0.00	$0.00	

Figure 3-214. Customer Inventory Sales History Screen

The following table describes the **Customer Inventory Sales History** screen details:

UPPER SECTION	
Cust #	Customer # for the selected customer.
Co. Name	Name of the selected Customer adding a sales order. Clicking the actual customer name displays a customer aging and open items report.
Contact	Name of main contact person for the selected company.
Address	Address associated with the selected company.
Region	5-digit alpha/numeric text string defining the region the customer is located.
Phone	Phone number of the customer.
Fax	Fax number of the customer.
Email	E-mail address of the customer. Clicking the e-mail address opens a Send New Mail window.
Special	Displays contents of information stored in **"special"** user defined field stored in each customer's master record. The title of this field can vary depending on whether the user renamed this field in the A/R master configuration.

View Inventory Sales History	Clicking this opens the Customer Inventory Sales History screen. This lists the past items ordered and the associated invoice numbers. From this screen these past items can be
Schedule Event	Select this option to schedule an event for this customer in the Event Calendar.
Add Order	This will open the Add Sales Order screen (Figure 3-191) and allow you to add an order for this customer. See the Add New Sales Order section on page 183 for further instructions.
LOWER SECTION	
Date	Date the sales order is entered into the system.
Type	Description of transaction history (e.g. invoice).
Inv. #	Unit of measure related to the inventory item such as each, gal, ft, inches, etc.
Salesman	Name of the salesman executing the sales order request.
Item #	Vendor of the inventory item.
Description	Description of the associated inventory items.
Qty.	Lists the quantity that was ordered of the associated inventory.
U/M	Unit of measure related to the inventory item such as each, gal, ft, inches, etc.
Unit Price	Price of the inventory item.
Ext. Price	Cost of the specified inventory item based on quanity ordered and unit price.
Add to Cart	Select the check boxes of inventory items listed that you want to reorder for that customer. Click the **Add to Cart** button,and the **Add Sales Order** screen displays. Once you click **Continue** in the Add Sales Order screen, the selected items are automatically added to the sales order and the amount due is calculated. See the Add New Sales Order section on page 183 for further instructions.

<Click> on the desired invoice from the **Invoice #** column to drilldown specific details of the selected invoice. The Accounts Receivable Sales Reporting & Drilldown screen (Figure 3-215) displays with all the inventory items listed for the selected customer's specified invoice.

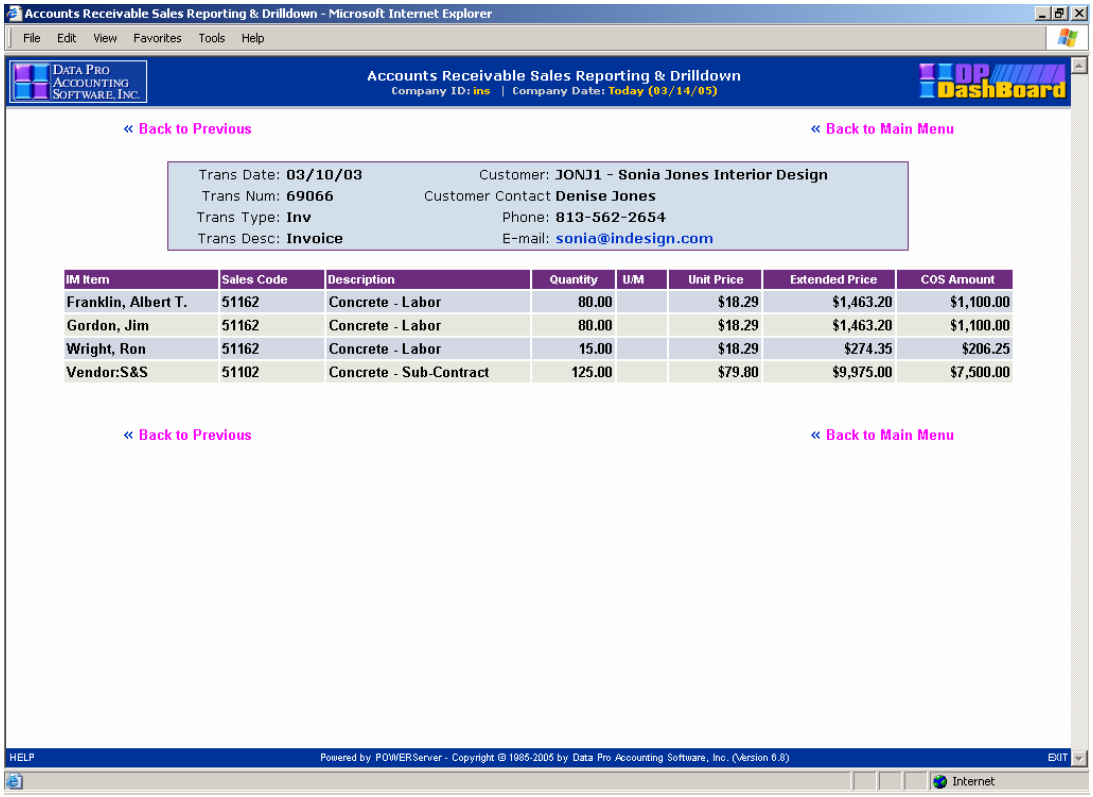


Figure 3-215 Accounts Receivable Sales Reporting & Drilldown

PAYROLL TIMESHEETS

The **Payroll Timesheets** options provide internal users within the firm with the ability to key in their daily timesheets without having to provide users direct access to the Payroll program and/or the Payroll data files. Based on the security rights set up in Advanced Security and the employee number set up in the DP/Dashboard Set up Users option, an employee can enter his or her own time. Also, depending on Security Rights set up in Advanced Security, an employee will be only allowed to view his employee number. This option is also integrated to the Job Cost module so an employee can enter a job and cost code for their time. No rates are shown on the screen. The system picks up the rates set up for the employee in the Payroll module. It will automatically increment the date/reference number allowing for multiple entries by day. No posting is done to Payroll until the Payroll employee updates time sheets to Payroll through the normal Post Time Sheets transaction.

Options include **Review/Add Timesheets** and **Timesheet Report**. These features are accessible in the **Payroll Timesheets** section of the DP/DashBoard Menu System screen. (Figure 3-216).

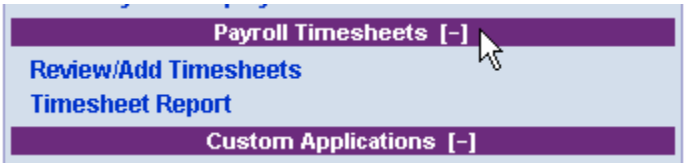


Figure 3-216. Payroll Timesheets Main Menu Options

Review/Add Timesheets

This mode allows you to add new employee time sheets and review those already entered into the system. This information includes the employee number and name, day/reference number, entry type, cost code, and pay information. These entries may be allocated by employee, department, and project.

The following screen illustrates where the **Payroll Timesheets>Review/Add Timesheets** option (Figure 3-217) is located on the DP/DashBoard Menu System screen.

Figure 3-217. Payroll Timesheets>Review/Add Timesheets Menu Option

To Review/Add a Timesheet:

1. From the Payroll Timesheets section of the DP/DashBoard main menu, <click> the **Review/Add Timesheets** option. The Review/Add Timesheets screen displays (Figure 3-218).

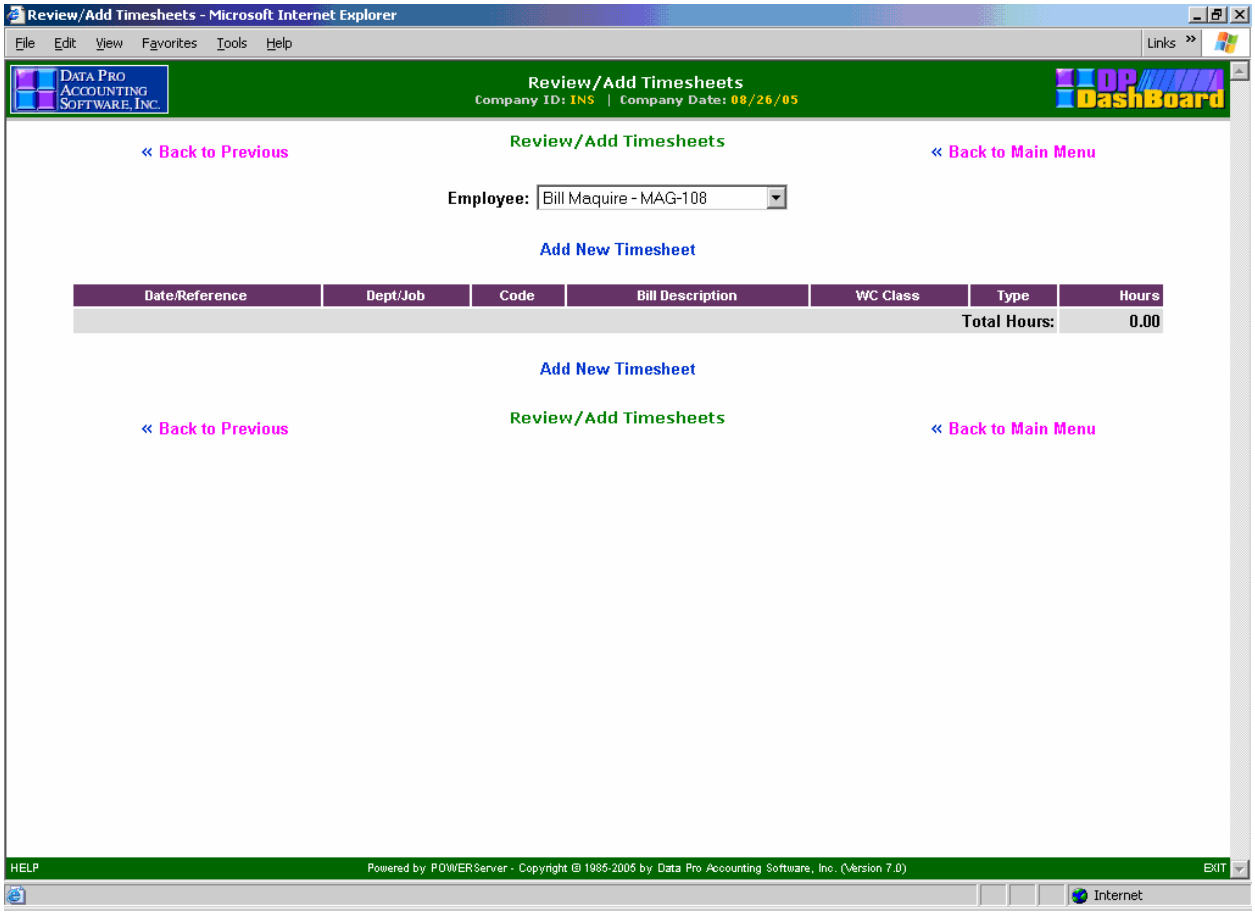


Figure 3-218. Payroll Timesheets –Review/Add Timesheets Screen

2. Select the desired employee name from the **Employee** pull-down menu.
3. <Click> the **Add New Timesheet** option. The Add New Timesheet window displays.

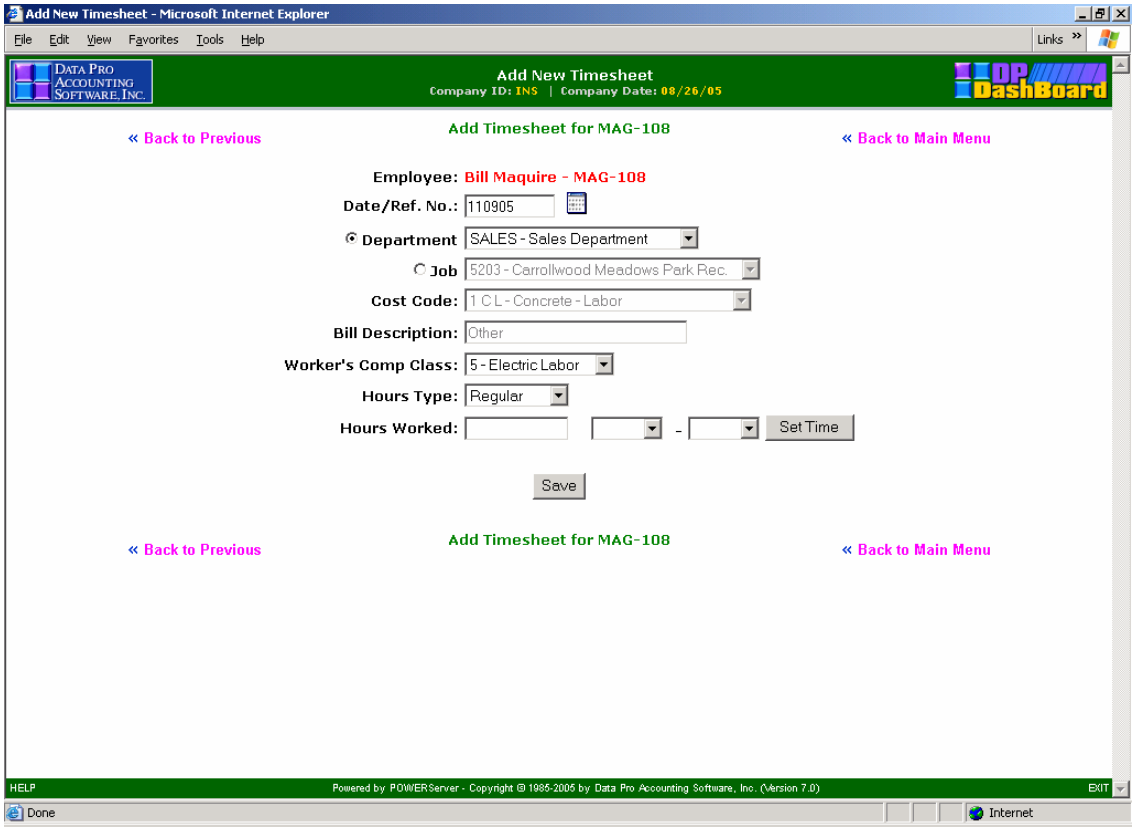


Figure 3-219. Add New Timesheet

The following table describes the Add Timesheet data items.

Employee	The name of the employee/id for which the timesheet is being added.
Date/Ref Number	Date the new timecard is added.
Dept/Project	Select the department the employee is assigned.
Job	Select a job description from the pull-down menu if a job
Cost Code No	This data item will only be used if you selected "**Job"** as the Entry Type, described earlier. If this entry is to be applied to a Job Cost project/job, you must select a cost code for the system to use when your Time Sheet Entry is posted.
Bill Description	If the option to allow ***"Entry of JC/TB Transaction Description"*** is turned off in the Master Configuration, this data item will not be displayed. The transaction description will be passed to the Job Cost transaction file when you post the entry.

Worker's Comp Class	If the option to ***"Allow Workers' Comp. Classes"*** is turned off in the Payroll Master Configuration, this data item will not be displayed. This item specifies which Workers' Compensation class the hours and dollars for this entry should be accumulated under. For hourly employees, it may also determine the default pay rate for this entry. This option can be used to define multiple pay rates, per employee, for specific types of work. The Workers' Comp. classes are defined in the Payroll module. Please refer to the Payroll manual for a complete explanation of their use.
Hours Type	This data item contains the hour's type for entry. The hour's type determines the rate of pay and the description for a particular class of hourly work. These types are defined in your Payroll module in the Master Configuration section under ***"Time Categories."*** These would include Normal time, Overtime, Piecework, etc.
Hours Worked	Total hours worked for the specified employee. Calculated by clicking the **Set Time** button.
From/To Time	If you have selected the option to enter hours as beginning and ending times, specify a time range.
Set Time	Click this button to calculate the number of hours worked based on the time range selected.

4. Enter the required information in the appropriate fields and make the desired selections from the pull-down menus.
5. <Click> the **Save** button to save your selections and enter the time sheet into the system.

Timesheet Report

This option provides a complete listing of Time Sheets not yet posted in the accounting system. Prior to updating time sheets, an employee can run the Time Sheet Report for their employee number only with totals by date and a grand total for the pay period. A user with administrator rights can add/change any of the time sheets posted. The administrator can also run the report for all employees.

If you want to view a full report, a user with administrator rights will need to change the report settings in the Time Sheet Entry module in the Infinity POWER application. The report will then automatically be printed using the information you have set up in the Master Configuration.

Figure 3-220. Payroll Timesheets>Timesheet Report Menu Option

To Display a Time Sheet Report

1. From the Payroll Timesheets section of the DP/DashBoard main menu, <click> the **Timesheet Report** option. The Time Sheet Report screen displays (Figure 3-221) listing all entered timesheets for the specified range of employees and date range.

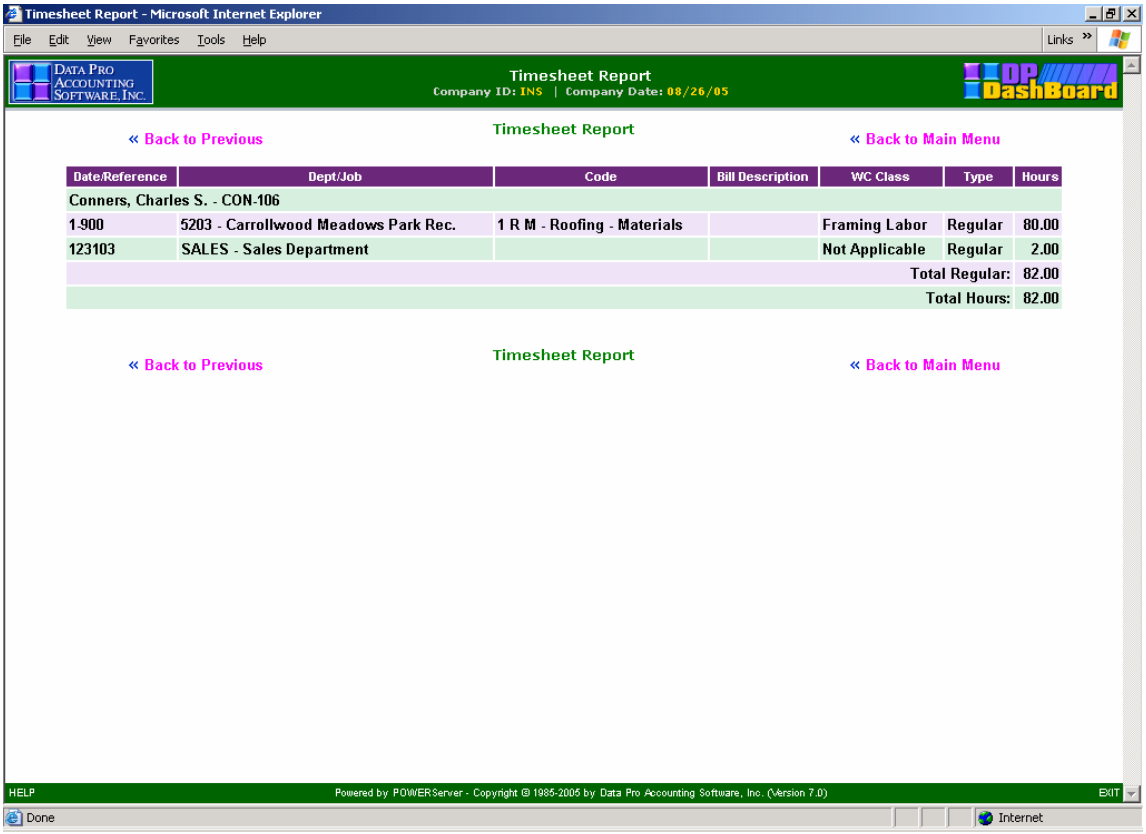


Figure 3-221. Time Sheet Report Example

MAPS & LISTS

The Maps & Lists section of the DP/DashBoard Menu System screen consists of the **Maps & Directions and Internal Phone List** options. The benefits of centralizing information such as corporate maps, directions, and phone lists are extremely valuable. Common information such as this can now be accessed quickly and accurately. Both of these options are user-defined, meaning you can change the main image icons, titles, and other attributes associated with these options.

The following screen (Figure 3-222) illustrates the section in the upper right corner of the screen where these options are displayed.

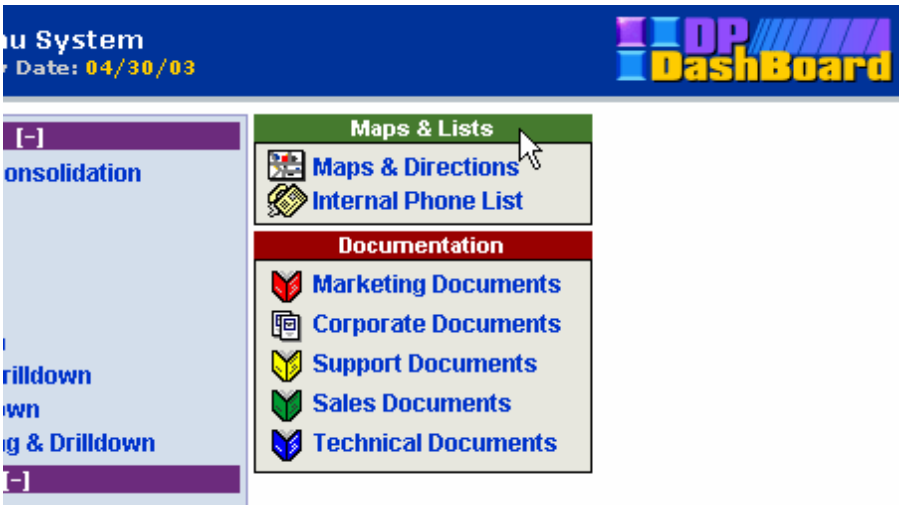


Figure 3-222. Maps & Lists Section

Maps & Directions

The Maps & Directions section is where you would keep company maps and directions so that your employees can quickly download and/or email them directly to a client that would like to visit your facility. This option is user-defined, which means you can change the title and main menu image icon. See the **DP/DashBoard Admin>DP/DashBoard Config>Setup Maps & Directions** section of this manual for detailed steps on these configuration options.

This option is accessible in the Maps & Lists section of the DP/DashBoard Menu System screen (Figure 3-223).

Figure 3-223. Maps & List >Maps & Directions Option

To Access the Maps & Directions Screen:

1. On the right side of the DP/DashBoard Menu System screen, select the **Maps & Directions** option from the Maps & Lists section. The Maps & Directions screen (Figure 3-224) displays.

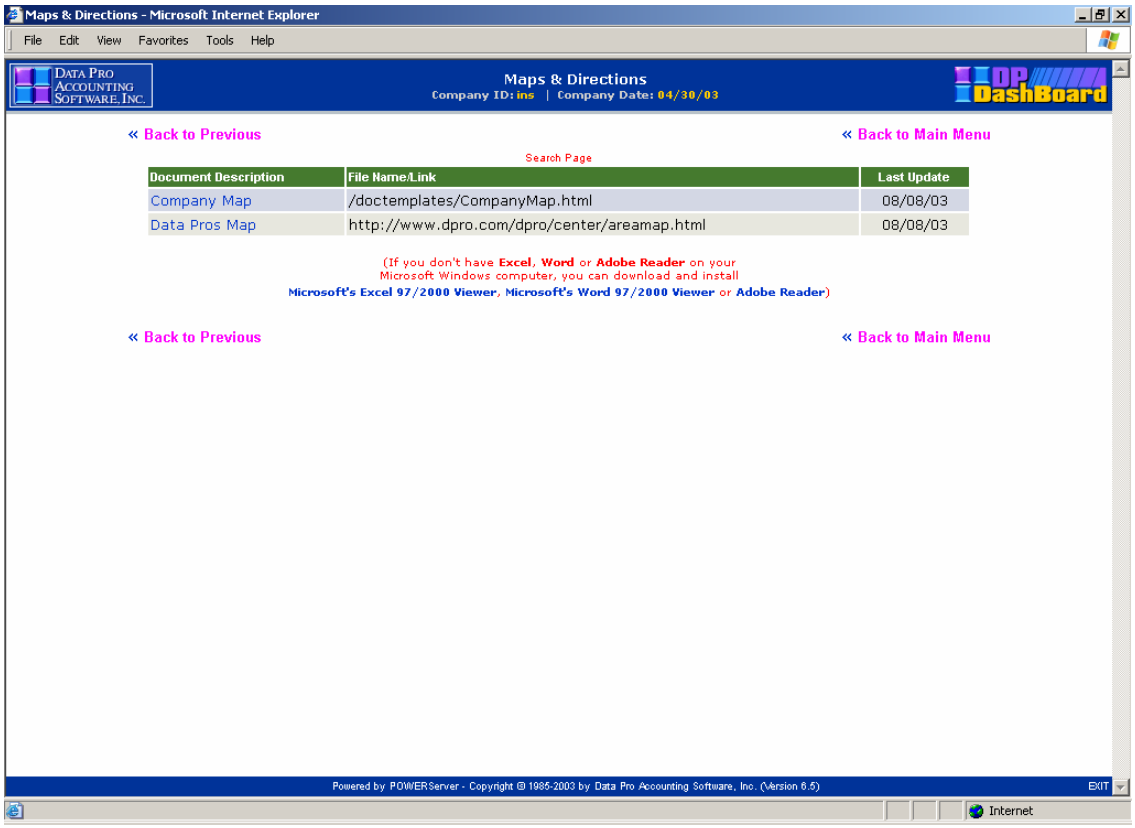


Figure 3-224. Maps & Directions Screen

To Open a Maps & Directions Document or Link:

1. From the Maps & Directions screen, <click> the desired document or link to open from the **Document Description** column. The document/link opens in the appropriate associated program.

NOTE

You must have the associated application loaded on your system in order for the document to open (i.e. if you are trying to open an *.xls* file, you need to have Microsoft Excel loaded on your system.)

To Download a Maps & Directions Document:

1. From the Maps & Directions screen, <right-click> the desired document to download from the **Document Description** column and select the **Save Target As** option (Figure 3-225). The Save As window displays.

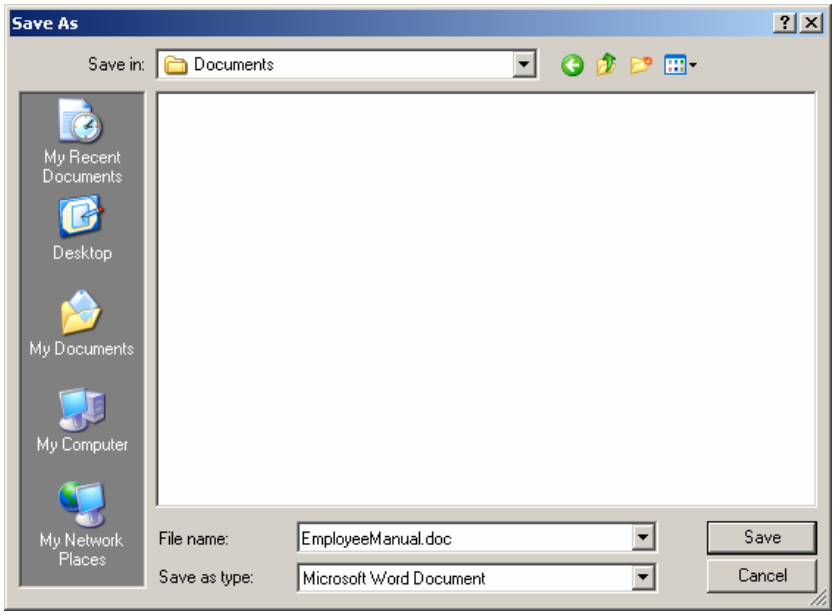


Figure 3-225. Save As Window

2. Select the desired directory to download the file into from the **Save In** pull-down menu.
3. If desired, rename the document in the **File Name** pull-down menu.
4. If appropriate, change the file type in the **Save as type** pull-down menu.
5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

Internal Phone List

It is always important to have a current company phone list. The internal phone list is automatically updated when new users are added or removed in the **DP/DashBoard Admin.>DP/DashBoard Config>Setup/Configure Users** option. Employee information such as name, title, department, location, phone numbers, and e-mail addresses are provided. If an e-mail address is provided, you can send an employee an email directly from this screen. The company address, contact information, and image are all user-defined and are setup in the **DP/DashBoard Admin.>DP/DashBoard Config>Setup Company Logo & Phone Numbers** section. This option is accessible in the Maps & Lists section of the DP/DashBoard Menu System screen (Figure 3-226).

Figure 3-226. Maps & Lists>Internal Phone List Option

To Access the Internal Phone List:

1. On the right side of the DP/DashBoard Menu System screen, select the **Internal Phone List** option from the Maps & Lists section. The Corporate Phone List screen (Figure 3-227) displays.

Figure 3-227. Corporate Phone List Screen

DOCUMENTATION

The Documentation section of the DP/DashBoard Menu System screen is where various different company documents and links can be **"housed"** so that they are easily accessed, managed, and ready on demand.

A key feature of this centralized Documentation Management function makes it possible to control access to specific documents. User rights determine if an employee can see all available documents or just departments that are specified. For instance, if a user is assigned to the Technical Support department, they may not be given access to Sales information. In that case, that user will not even see the Sales Documents option in the Documentation section at all.

DP/DashBoard is configured for the following documents: Marketing Documents, Corporate Documents, Support Documents, Sales Documents, and Technical Documents. All these menu options are user-defined in the **DP/DashBoard Admin>DP/DashBoard Config** options. Titles, headings, images, and main menu icons can all be customized to what you want them to be.

These features are accessible in the Documentation section of the DP/DashBoard Menu System screen (Figure 3-228).

Figure 3-228. Documentation Section

Sample Documents

The following screen (Figure 3-229) is an example of the types of documents you may consider adding to the Marketing Documents section. Price lists, product data sheets, order forms, references, etc., are all documents that are beneficial to have handy for employees and for potential customers. Notice how headings break up the different types of data sheets into categories. These are features you define!

Document Description	File Name/Link	Last Update
About US	aboutus.pdf	07/14/03
Version 6.8 Feature List	68FEAT.pdf	07/06/05
Product Data Sheets		
Accounts Payable Data Sheet	APdatasheet.pdf	07/06/05
Accounts Receivable Data Sheet	ARdatasheet.pdf	07/06/05
Check Reconciliation Data Sheet	CRdatasheet.pdf	07/06/05
Customer Support Management Data Sheet	CSMdatasheet.pdf	07/06/05
General Ledger Data Sheet	GLdatasheet.pdf	07/06/05
Inventory Management Data Sheet	IMdatasheet.pdf	07/06/05
Job Cost Data Sheet	JCdatasheet.pdf	07/06/05
Purchase Order Data Sheet	POdatasheet.pdf	07/06/05
Point of Sale Data Sheet	POSdatasheet.pdf	07/06/05
Payroll Data Sheet	PRdatasheet.pdf	07/06/05
Report Writer Data Sheet	RWdatasheet.pdf	07/06/05
Report Writer (Run Time) Data Sheet	RWRdatasheet.pdf	07/06/05
System Admin - Standard Version Data Sheet	SA100datasheet.pdf	07/06/05
System Admin - Client Server-SQL Version Data Sheet	SA695datasheet.pdf	07/06/05
System Admin - Small Business Version Data Sheet	SA692datasheet.pdf	07/06/05
Sales Order Data Sheet	SOdatasheet.pdf	07/06/05
Time Sheet Entry Data Sheet	TEdatasheet.pdf	07/06/05
E-Commerce Data Sheets		
DP-DashBoard Data Sheet	dpdbdatasheet.pdf	07/06/05
DP-Store Data Sheet	DPSTOREdatasheet.pdf	07/06/05
DP-AUTO Data Sheet	DPAUTOdatasheet.pdf	07/06/05

Figure 3-229. Marketing Documents Example

The following screen (Figure 3-230) is an example of the types of documents you may consider adding to the Corporate Documents section. Remember, all document categories and associated features can be customized and renamed.

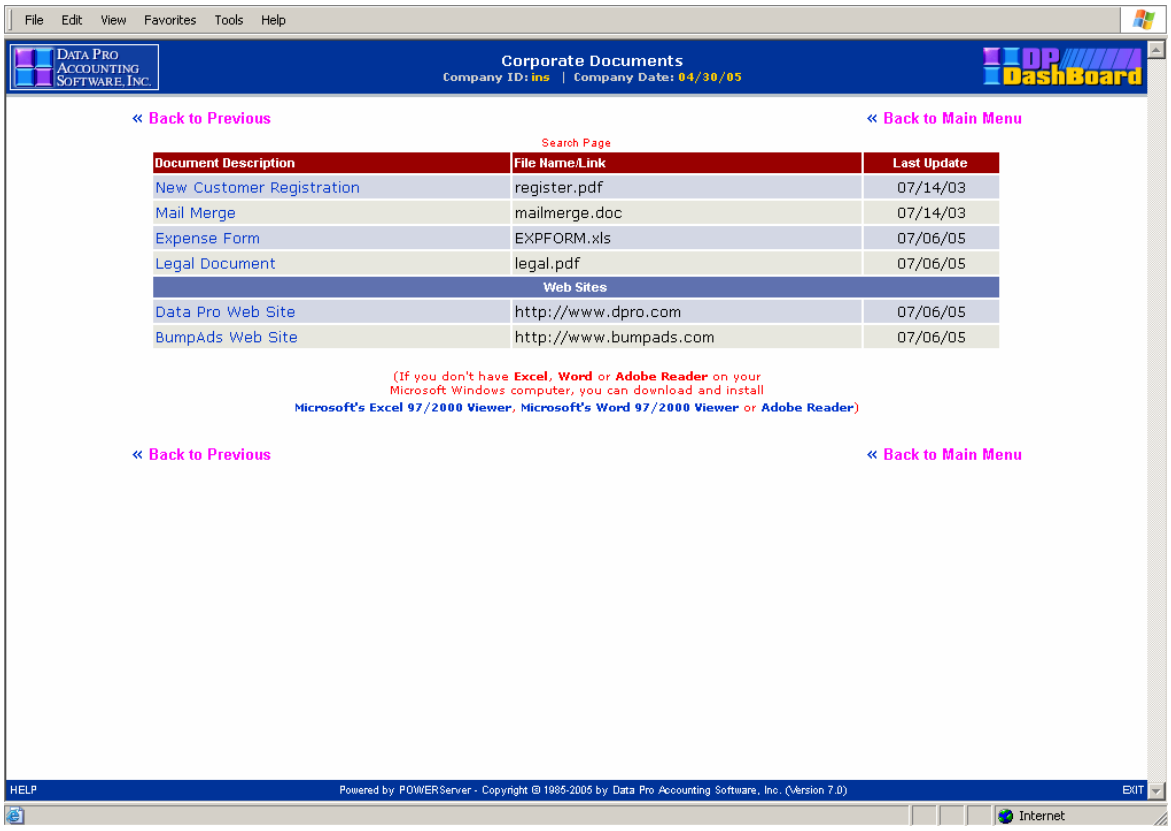


Figure 3-230. Corporate Documents Example

General Documentation Functions

The following sections describe procedures on how to open documents from the DP/DashBoard Menu System screen, print documents on demand, and download documents. These procedures can be performed from any of the Document screens (i.e. Marketing Document, Corporate Documents, etc) under the Documentation section of the DP/DashBoard Menu System screen.

To Download a Document:

1. In the appropriate Documents screen, <right-click> the desired document to be downloaded (Figure 3-231) and select the **Save Target As** option. The Save As window (Figure 3-232) displays.

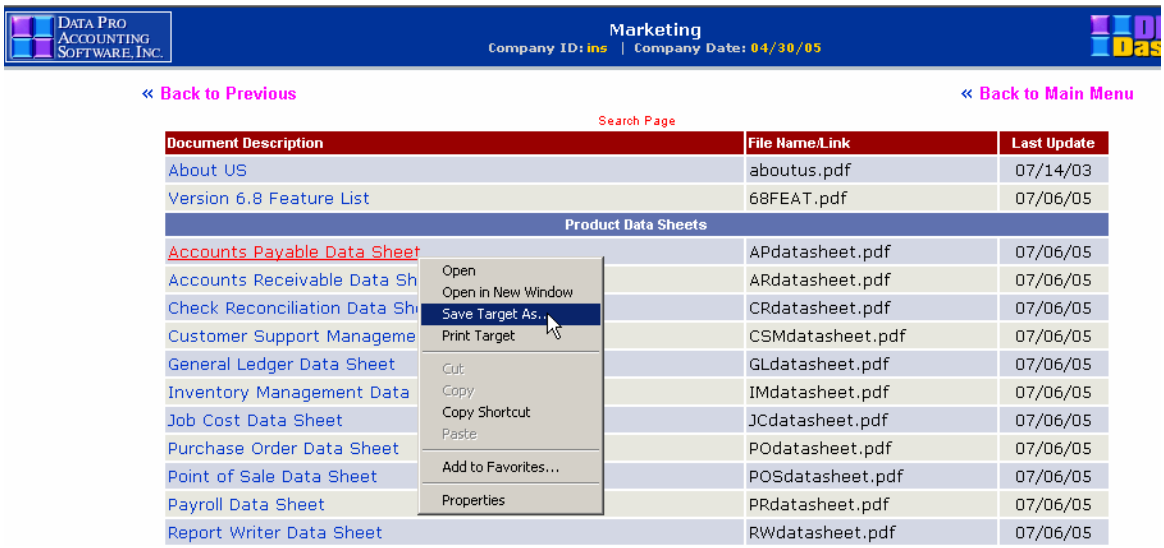


Figure 3-231. Documents Section >Download Document Function – Marketing Documents Example

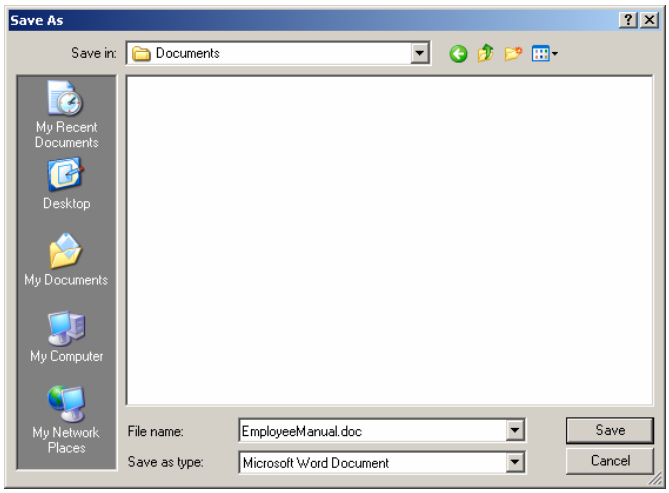


Figure 3-232. Save As Window

2. Select the desired directory to download the file into from the **Save In** pull-down menu.
3. If desired, rename the document in the **File Name** pull-down menu.
4. If appropriate, change the file type in the **Save as type** pull-down menu.
5. <Click> the **Save** button. The document saves in the selected directory as the file name/type specified.

To View a Document or Link:

1. On the right side of the DP/DashBoard Menu System screen, select the desired **Documents** (i.e. Marketing Documents, Corporate Documents, etc) option from the **Documentation** section (Figure 3-234). The appropriate Documents screen displays.

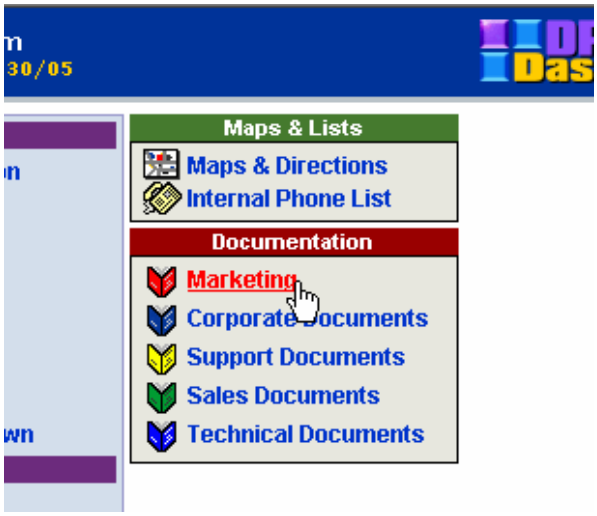
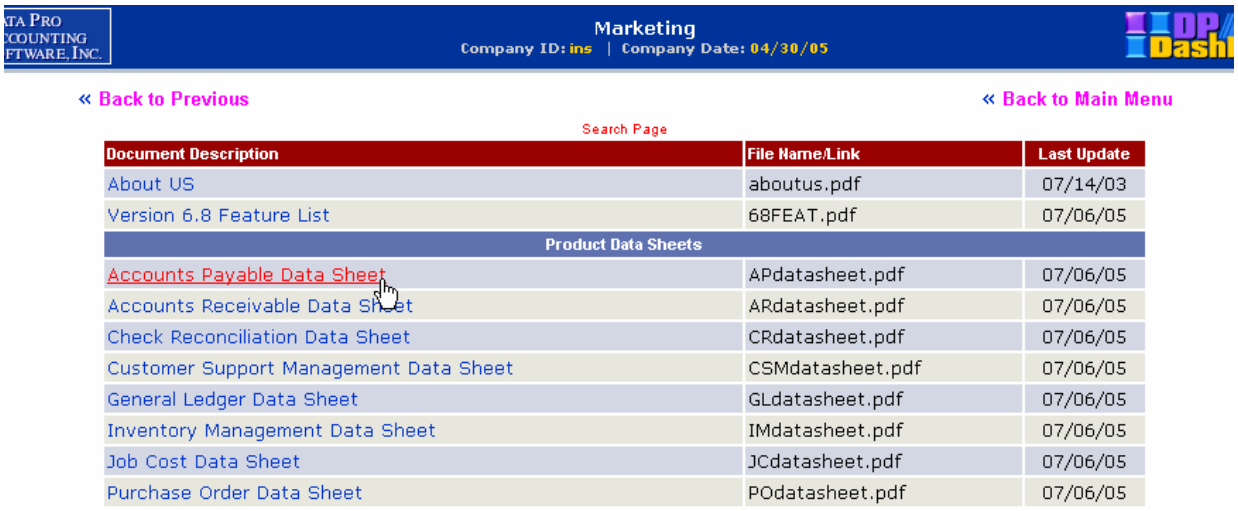


Figure 3-233. Documents Section – Select Marketing Documents Example

2. <Click> the desired document or link to open from the **Document Description** column (Figure 3-234). The document /link opens in the appropriate associated program.



Document Description	File Name/Link	Last Update
About US	aboutus.pdf	07/14/03
Version 6.8 Feature List	68FEAT.pdf	07/06/05
Product Data Sheets		
Accounts Payable Data Sheet	APdatasheet.pdf	07/06/05
Accounts Receivable Data Sheet	ARdatasheet.pdf	07/06/05
Check Reconciliation Data Sheet	CRdatasheet.pdf	07/06/05
Customer Support Management Data Sheet	CSMdatasheet.pdf	07/06/05
General Ledger Data Sheet	GLdatasheet.pdf	07/06/05
Inventory Management Data Sheet	IMdatasheet.pdf	07/06/05
Job Cost Data Sheet	JCdatasheet.pdf	07/06/05
Purchase Order Data Sheet	POdatasheet.pdf	07/06/05

Figure 3-234. Documents Section>View Function – Marketing Documents Example

NOTE

You must have the associated application loaded on your system in order for the document to open (i.e. if you are trying to open an *.xls* file, you need to have Microsoft Excel loaded on your system.)

To Print a Document:

1. From the desired Documents screen, <right-click> the document you want to print from the **Document Description** column and select the **Print Target** option (Figure 3-235). The Print window displays.
2. Select the desired printer and <click> the **Print** button.

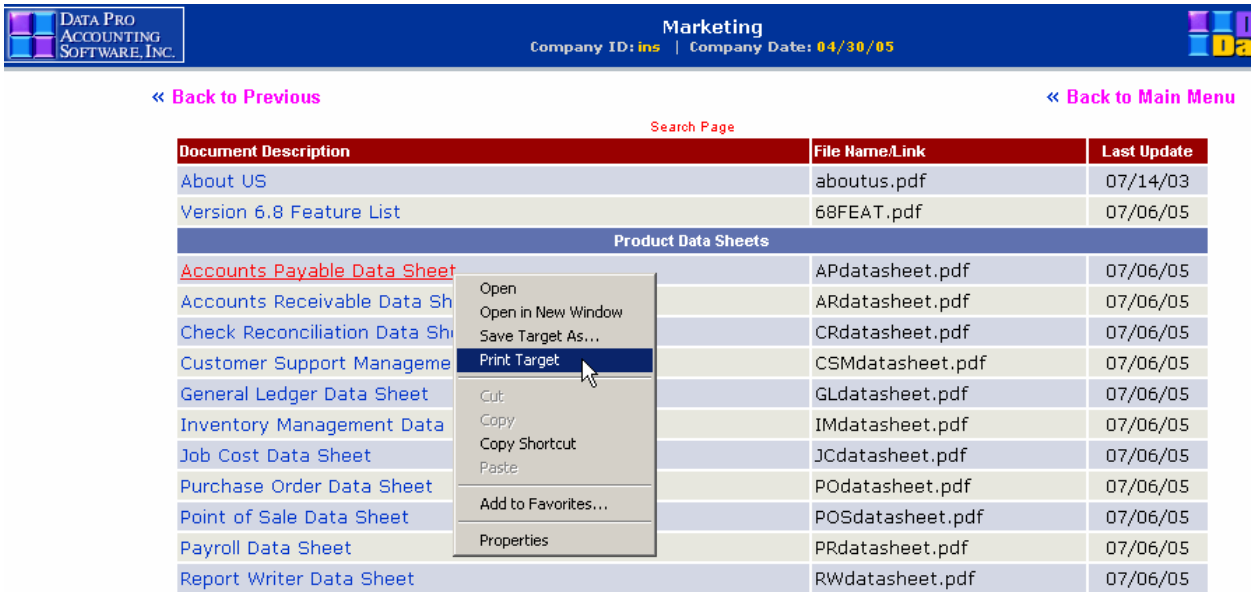


Figure 3-235. Print Function – Marketing Documents Example

CHAPTER 4 DP/DASHBOARD TROUBLESHOOTING GUIDE

This troubleshooting guide is designed to help you, the user, find solutions to common problems concerning the installation and configuration of this software and its related products.

This document currently includes troubleshooting procedures for AntiVirus Software Settings. This document will be updated frequently as Microsoft Windows' network and security functions evolve and impact the current installation and configuration process. Sections will be added as appropriate. Go to **www.dpro.com**, Manuals section, for the most recent ***DP/DashBoard Troubleshooting Guide***.

ANTIVIRUS SOFTWARE SETTINGS

If you are running Norton AntiVirus or McAfee AntiVirus software programs, some default settings need to be disabled in order for **DP/DashBoard** to run properly. If you encounter problems launching **DP/DashBoard** after you have performed all the necessary procedures in *Chapter 2 Installation Procedures* of the *DP/DashBoard User Manual*, it is possible that you many need to change some settings in your VirusScan software.

McAfee AntiVirus

This section documents problems related to using MacAfee AntiVirus software. This procedure reflects McAfee VirusScan 8.0. Depending on what version you are running, the following steps may differ slightly.

Disable Script Blocking in McAfee:

If the script blocking feature is enabled, all necessary scripts will be halted and the **DP/DashBoard** system will not execute properly.

1. From the McAfee Security main screen, <click> the **VirusScan** option on the left-hand side of the screen. The AntiVirus tab displays with options.

Figure 4-1. McAfee Security Center – VirusScan Tabbed Page

2. <Click> the **Configure VirusScan Options** button. The MacAfee VirusScan Options window displays.
3. <Click) the **ActiveShield** tabbed page, and then <click> the **Advanced** button.

Figure 4-2. ActiveShield Tabbed Page

Several different tabbed pages display.

Figure 4-3. Advanced Active Shield Options Window

4. <Click> the **ScriptStopper** tabbed page and ensure that the **Enable ScriptStopper** check box is **NOT** checked. If this option is checked, the software will not be able to perform necessary processes and will halt the communication between POWERServer, Infinity POWER products, and DP/DashBoard.

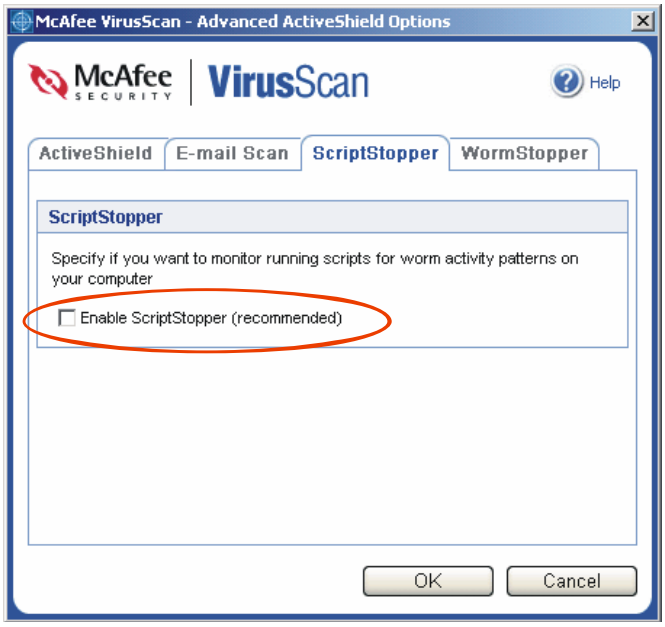


Figure 4-4. Advanced ActiveShield Options

5. <Click> the **OK** button.

Norton AntiVirus

This section documents problems related to using Norton AntiVirus software. This procedure reflects Norton AntiVirus 2004. Depending on what version you are running, the following steps may differ slightly.

Disable Script Blocking in Norton:

If the script blocking feature is enabled, all necessary scripts will be halted and the **DP/DashBoard** system will not execute properly.

1. In the Norton AntiVirus main screen, confirm if Script Blocking is set to **ON** or **OFF**. If set to OFF, then stop here and do not continue with the following steps. If Set to ON, then follow the remaining steps to disable this setting.

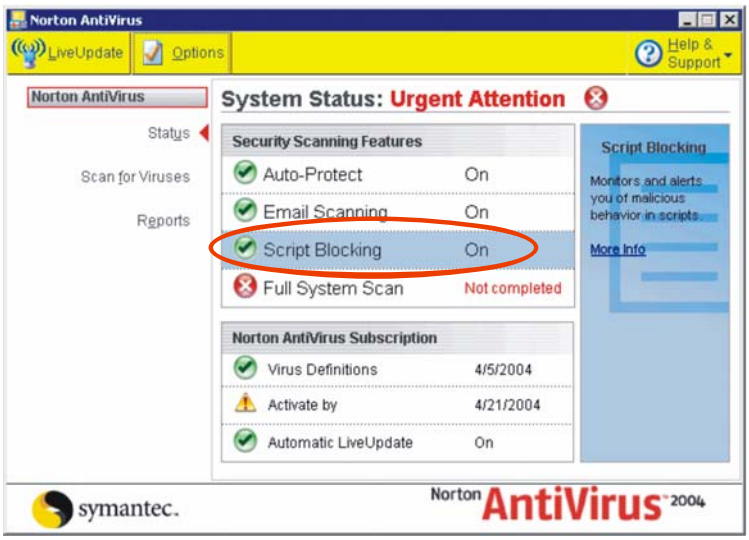


Figure 4-5. Norton AntiVirus Main Window

2. If Script Block is set to **ON**, then <click> the **Options** button. The Norton AntiVirus Options window displays.

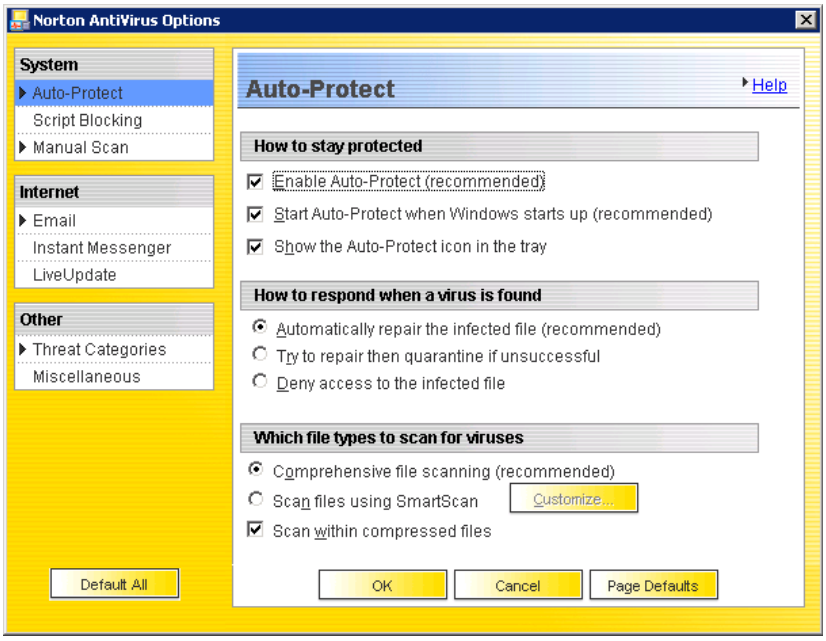


Figure 4-6. Norton AntiVirus Options Window

3. Under the **System** menu, <click> the **Script Blocking** option. The Script Blocking setting options display in the right side of the window.
4. Uncheck the **Enable Script Blocking** check box to disable this function.

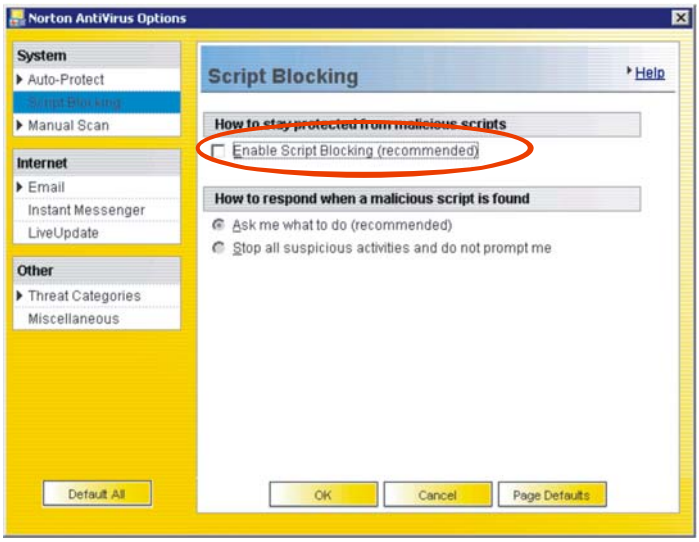


Figure 4-7. Norton Antivirus - Disable Script Blocking Function

5. <Click> the **OK** button.

SERVER OBJECT ERROR

Perform the following steps if you encounter this object error message when attempting to login to the server. This error is normally caused by installing the **DP/Dashboard** on a Windows Terminal Server environment where Windows redirects the installation of system files into a user's virtual system directory.

```
Server Object error 'ASP 0178 : 80070005'
Server: CreateObject Access Error

/inc/dplib.asp, line 60

The call to Server.,.CreateObject failed while checking permissions.
Access is denied to this object.
```

To Locate and Copy .dll File into System Directory :

1. Verify the ***dpcomm.dll*** file is installed in the ***C\windows\system32*** directory on your server. If not you will need to copy this file into that directory.
2. If the file is not in the directory, use the Windows Search tool by <clicking> the **Start** button and select the **Search>For Files or Folders…** menu option. The Search Results window displays.
3. <Click> the **All files and folders** option and type "**dpcomm.dll**" to find where the file is located.

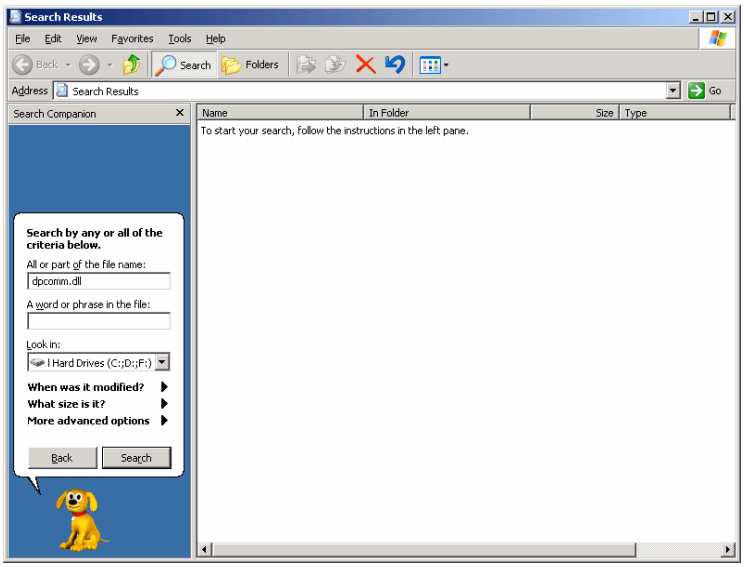


Figure 4-8. All Files and Folders Option

4. <Click> the **Search** button.
5. When the ***dpcomm.dll*** file is located, copy it into the ***c:\windows\system32*** directory.
6. In Windows, <click> the **Start** button and select the **Run** menu option. The Run dialog box displays.
7. Type the command "**regsvr32 c:\windows\system32\dpcomm.dll**".

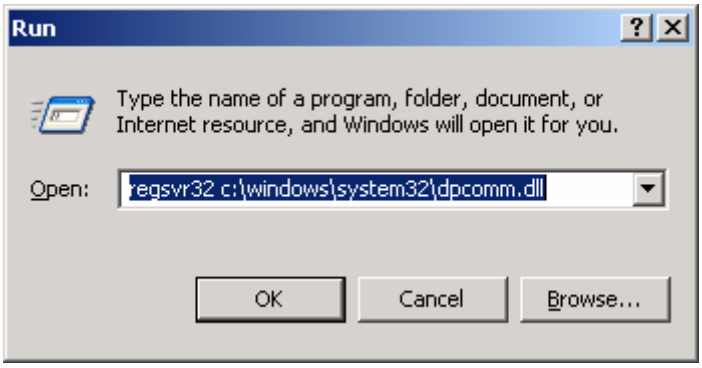


Figure 4-9. Run Window

8. <Click> the **OK** button.

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CHAPTER 5 ACRONYMS

Term	Meaning
ALF	Annual License Fee
AP	Accounts Payable
AR	Accounts Receivable
CPA	Certified Public Accountant
CR	Check Reconciliation
DB	Database
DHCP	Dynamic Host Configuration Protocol
FTP	File Transfer Protocol
GL	General Ledger
GUI	Graphical User Interface
IIS	(Microsoft) Internet Information Service
IP Address	Internet Protocol address
P/N	Part Number
SA	System Administrator
SMTP	Simple Mail Transfer Protocol
VPN	Virtual Private Network

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